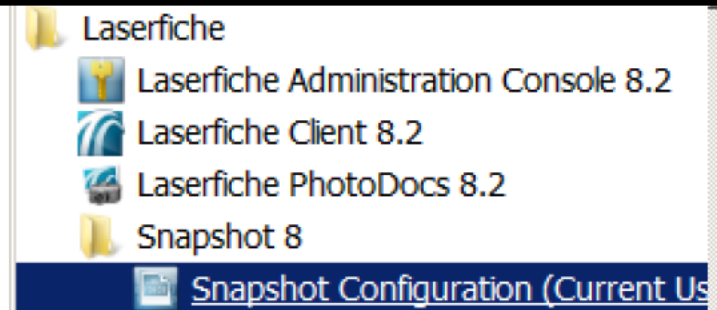


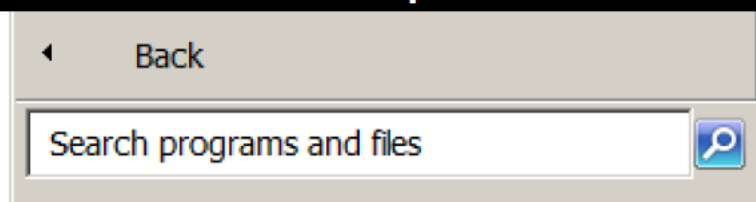
Snapshot/Scanner Configurations

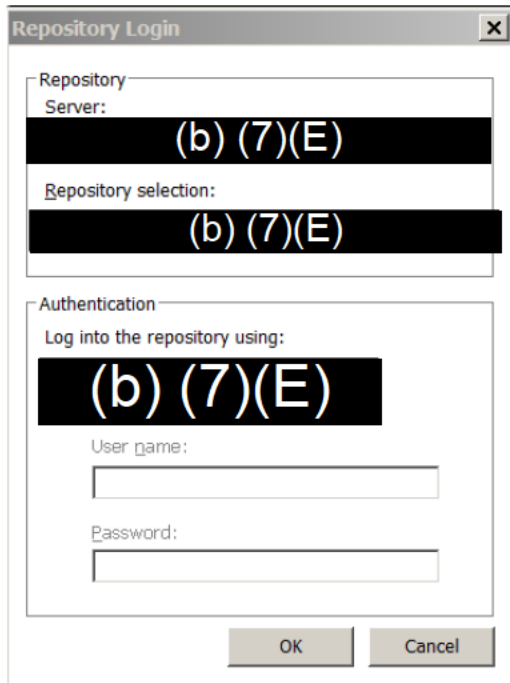
- Use the following procedures to configure Snapshot on your workstation

Not Responsive



Not Responsive





Repository Login

Repository Server: (b) (7)(E)

Repository selection: (b) (7)(E)

Authentication

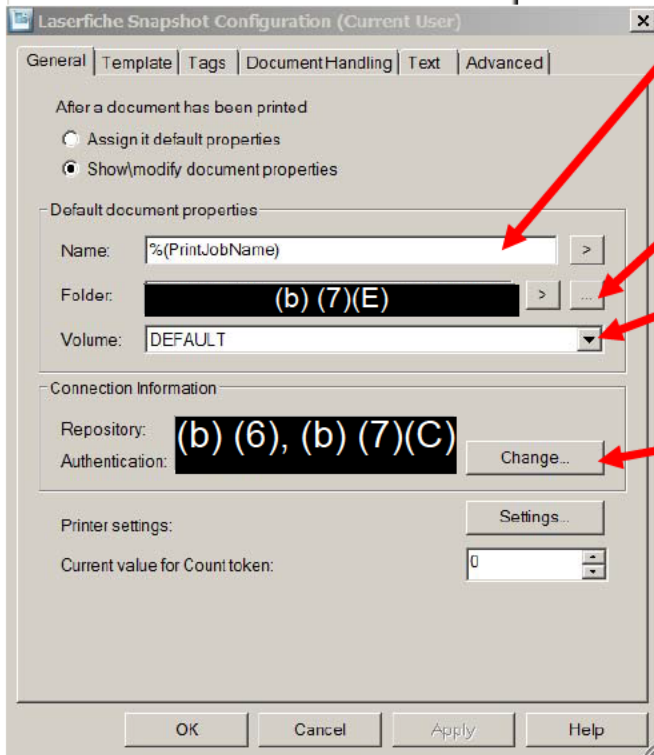
Log into the repository using:

(b) (7)(E)

User name:

Password:

OK Cancel



Laserfiche Snapshot Configuration (Current User)

General | Template | Tags | Document Handling | Text | Advanced

After a document has been printed

☐ Assign it default properties

☒ Show/modify document properties

Default document properties

Name: %(PrintJobName) >

Folder: (b) (7)(E) > ...

Volume: DEFAULT ▾

Connection Information

Repository: (b) (6), (b) (7)(C) Change...

Authentication:

Printer settings: Settings...

Current value for Count token: 0 ▾

OK Cancel Apply Help

1

%(PrintJobName) means that the original document name will be used as the document title when you Snapshot.

2

Click on the ellipsis (...) and select a default folder in Laserfiche where your documents will be stored when you Snapshot.

3

From the dropdown button, select DEFAULT for the Volume.

4

Click on the Change button to get Server and Repository pop-up window on top.

After setting up initial settings, please confirm your printer settings when printing a document to Snapshot 8 using the following steps.

Print



Printer

Name:  Lf Snapshot 8

Status: Idle

Type: Snapshot 8 Driver 1252

Where: Snapshot8Port

Comment:

Properties

Find Printer...

☐ Print to file

☐ Manual duplex

Click on Properties

Page range

☒ All

☐ Current page

☐ Selection

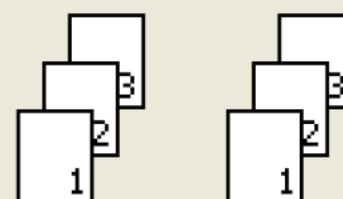
☐ Pages:

Enter page numbers and/or page ranges separated by commas. For example, 1,3,5-12

Copies

Number of copies:

1



☒ Collate

Print what: Document

Print: All pages in range

Zoom

Pages per sheet:

1 page

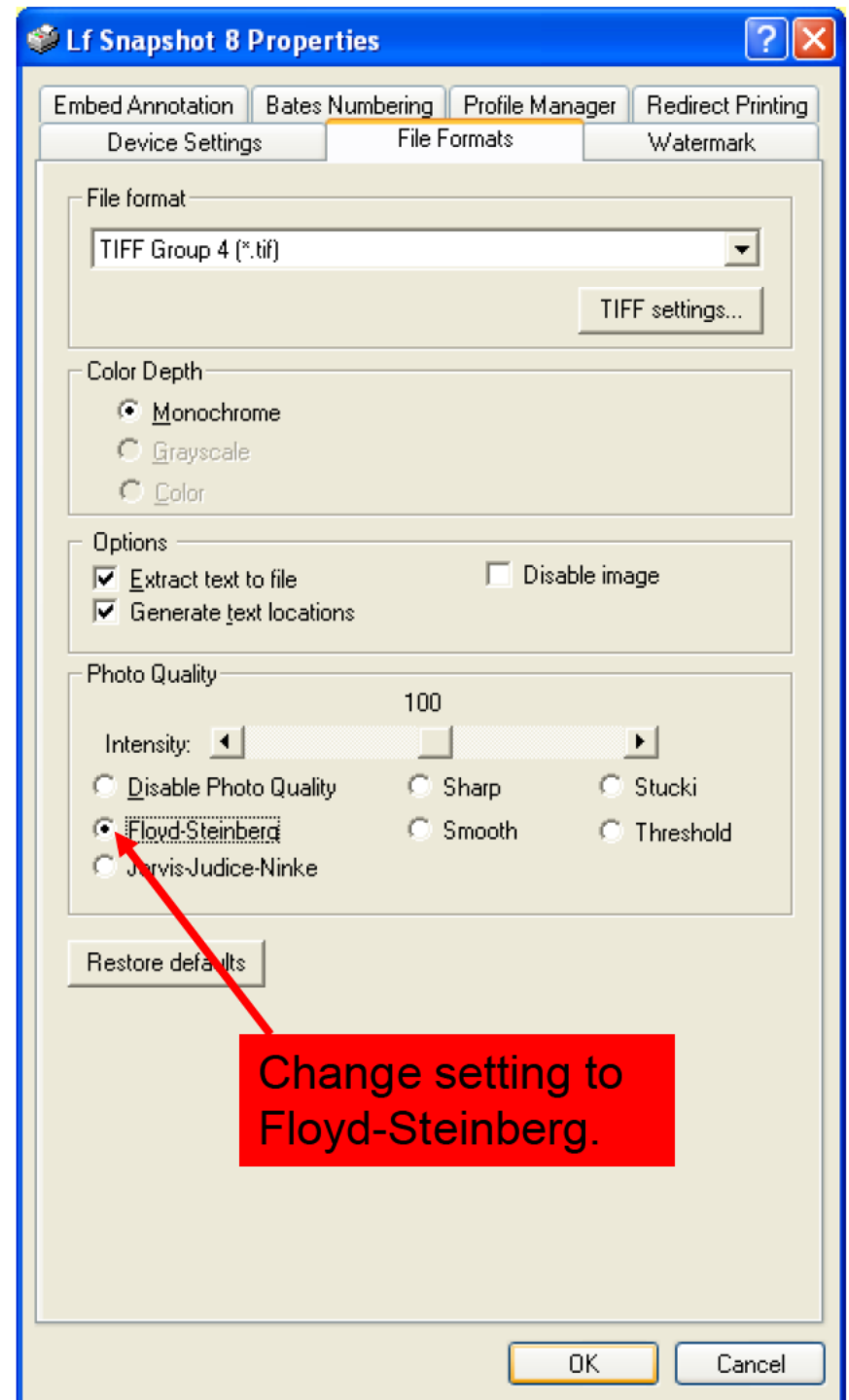
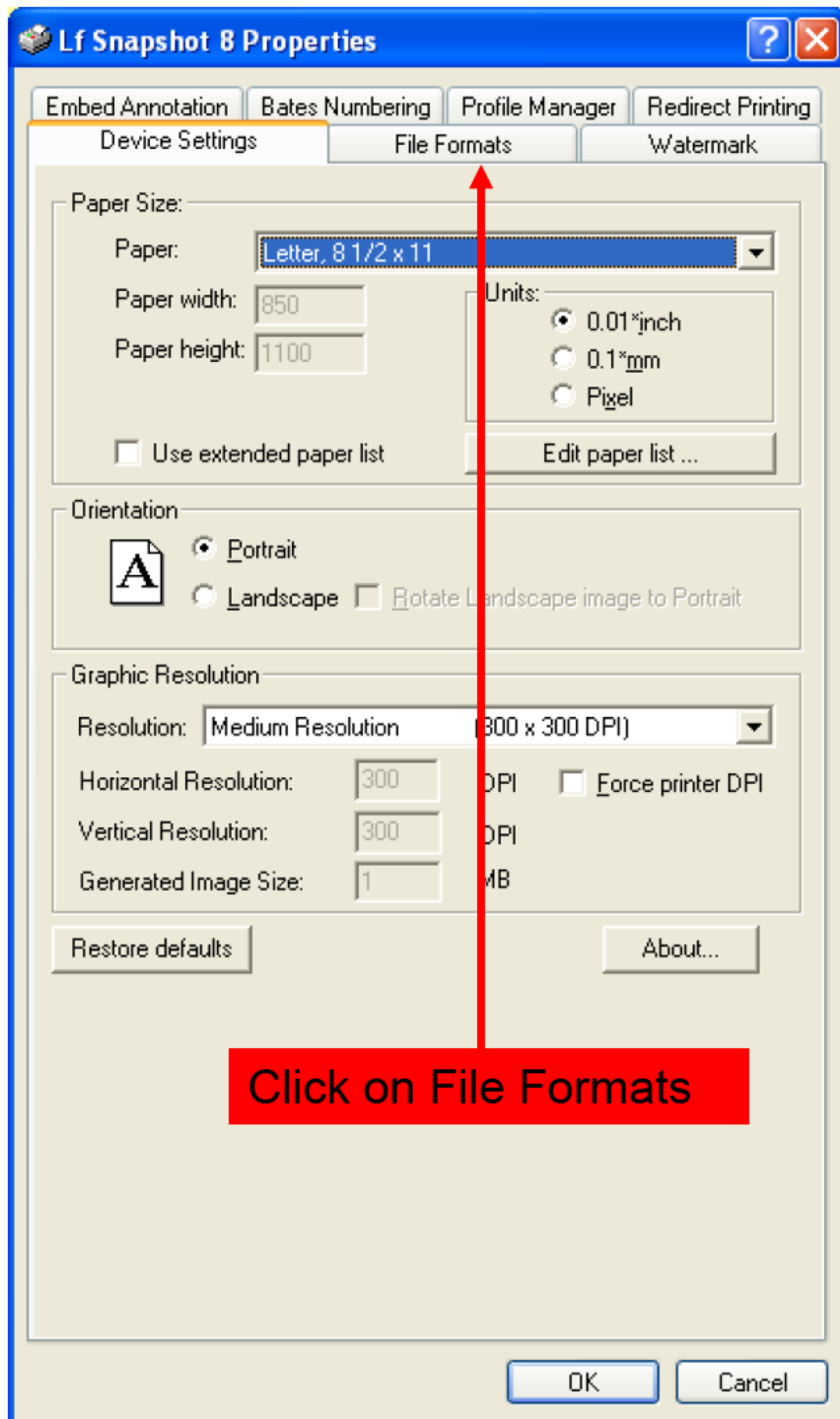
Scale to paper size:

No Scaling

Options...

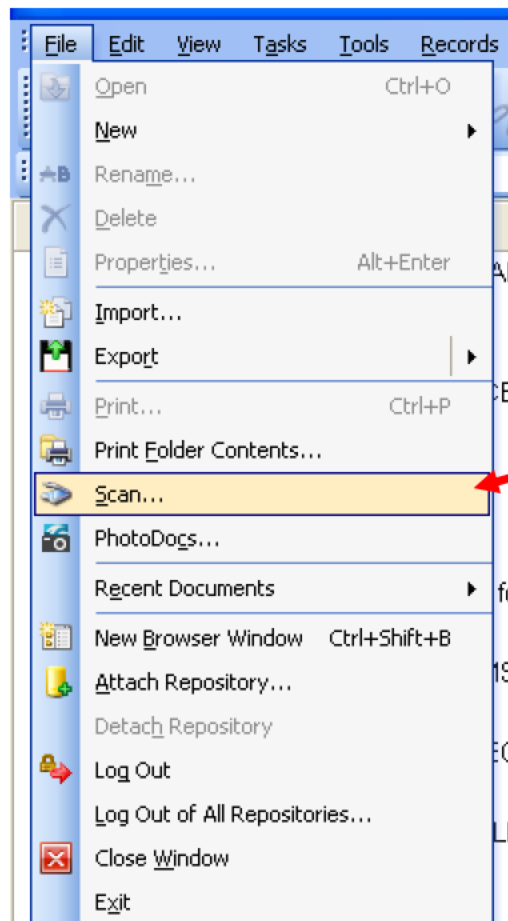
OK

Cancel

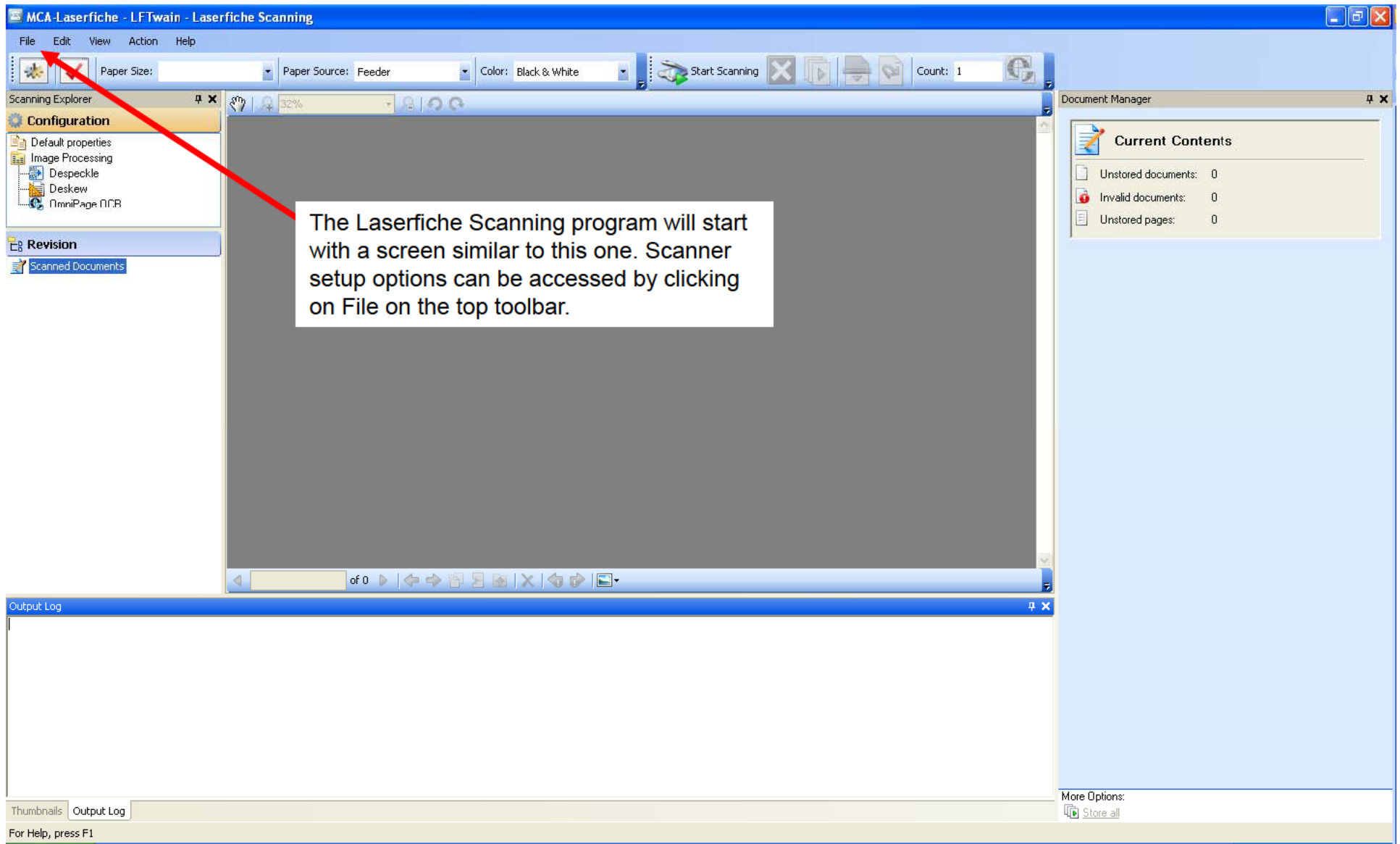


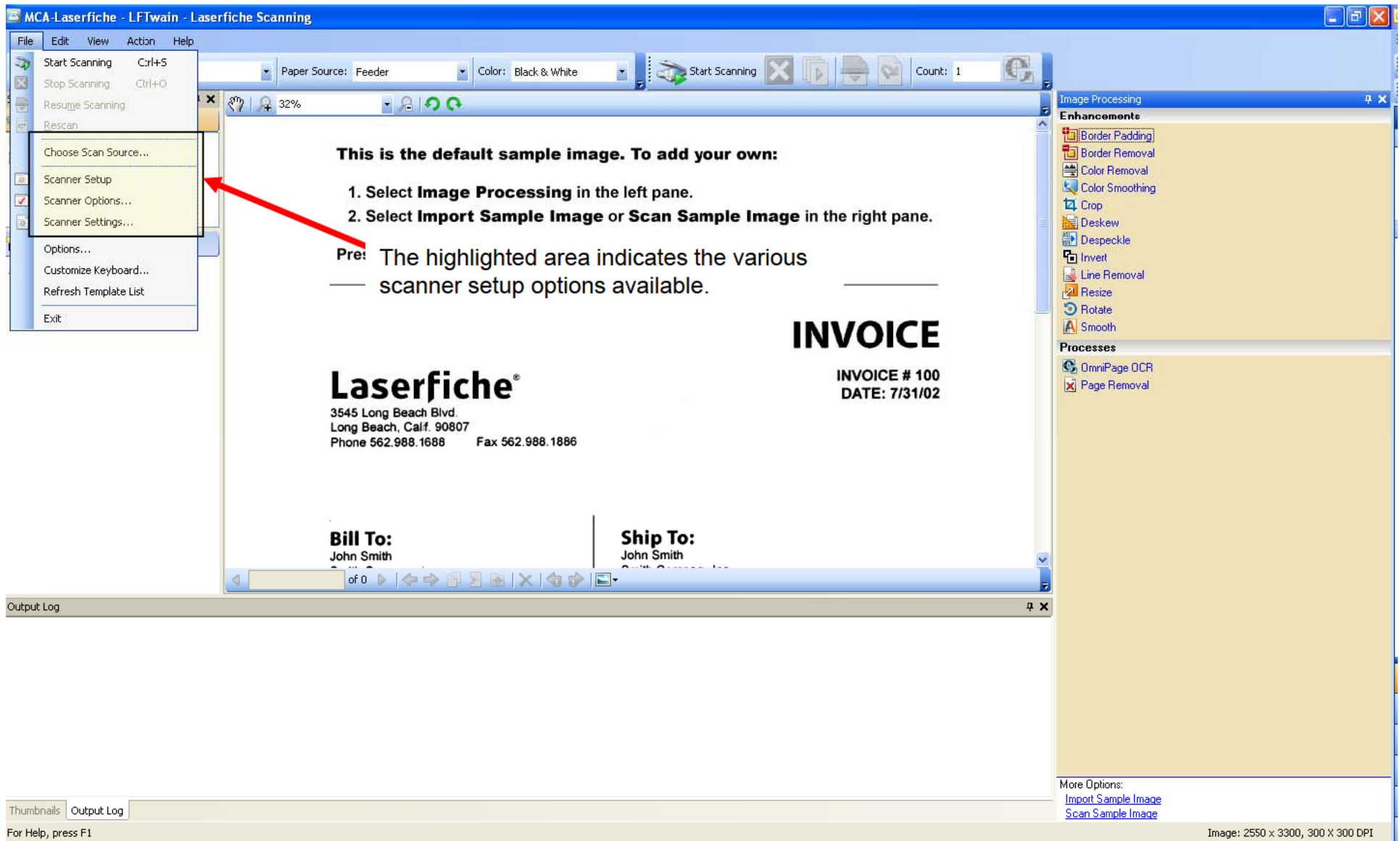
Snapshot/Scanner Configurations

- Use the following procedures to configure the scanner on your workstation

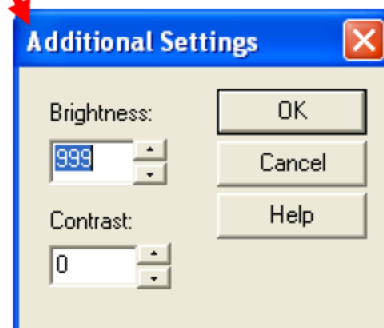
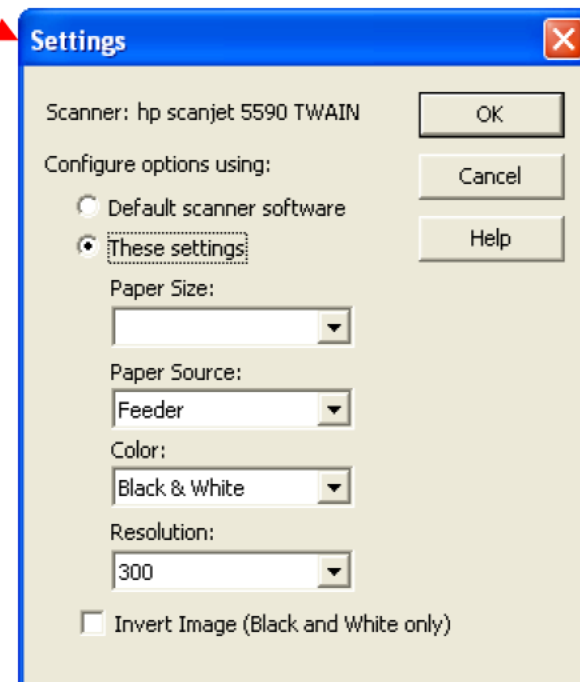
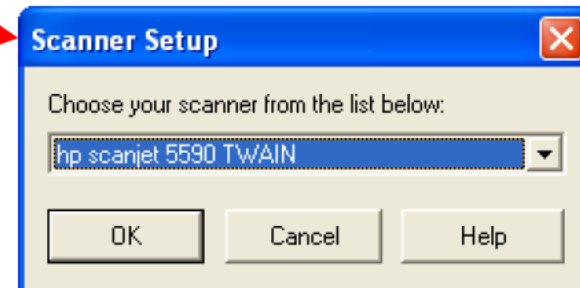
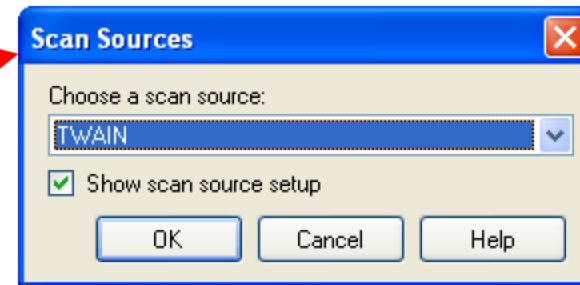
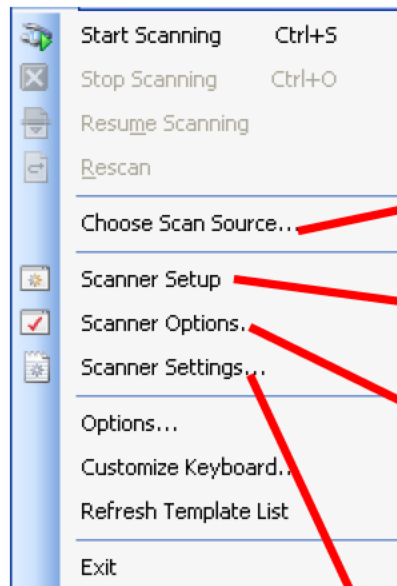


To scan a document into Laserfiche, you will first need to be in a folder that you have access to scan into. Click on the scanner icon on the top task bar, or click on the File > Scan option on the drop-down.

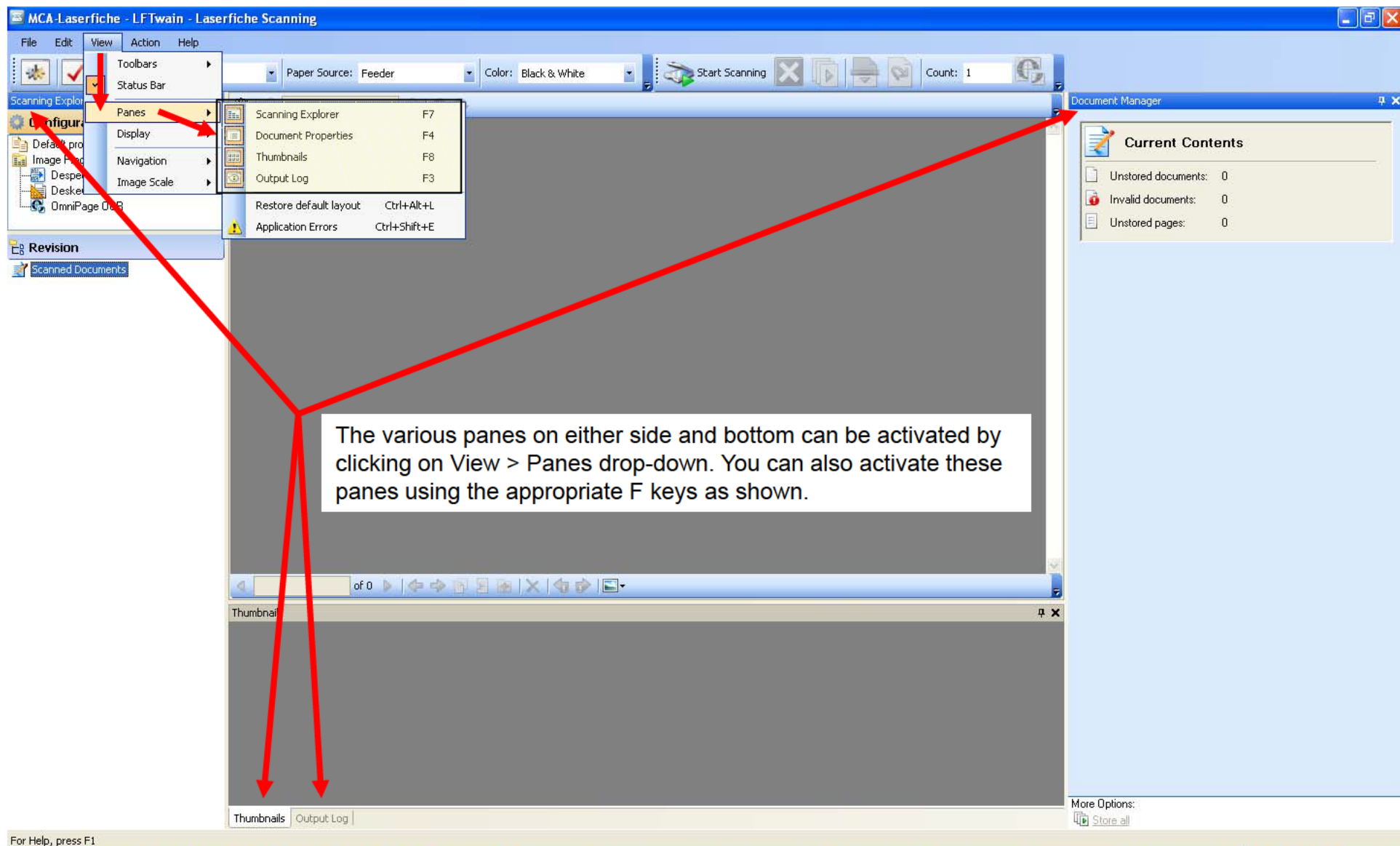




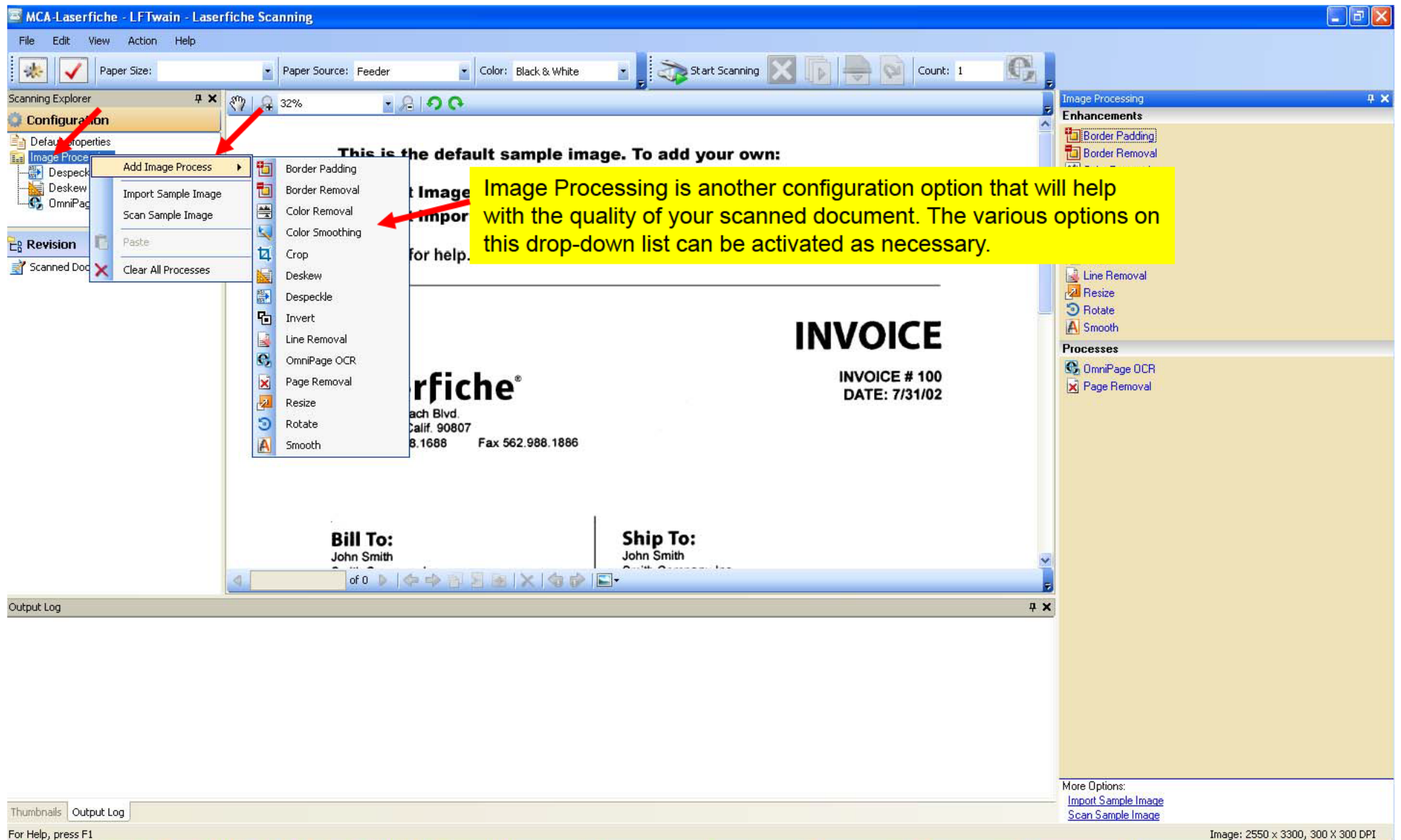
(b) (7)(E)



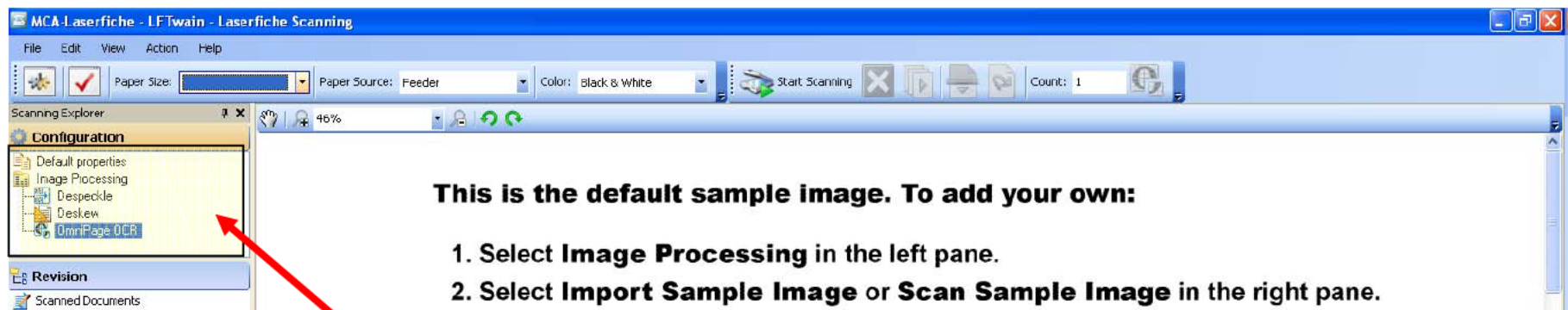
The various pop-up screens are shown. Please configure your specific scanner as necessary. Set color to Black & White and resolution to 300 as the defaults.



(b) (7)(E)



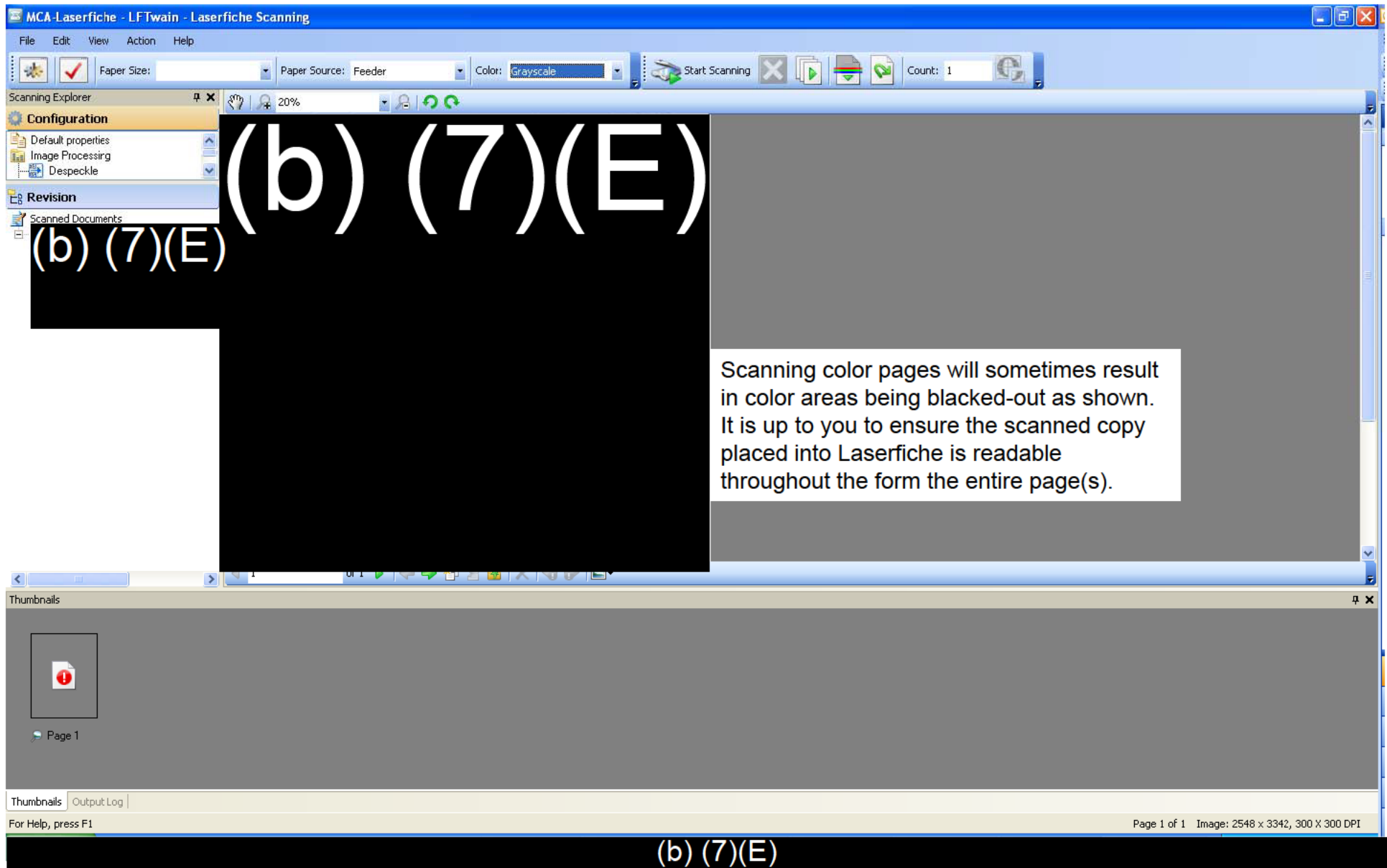
(b) (7)(E)

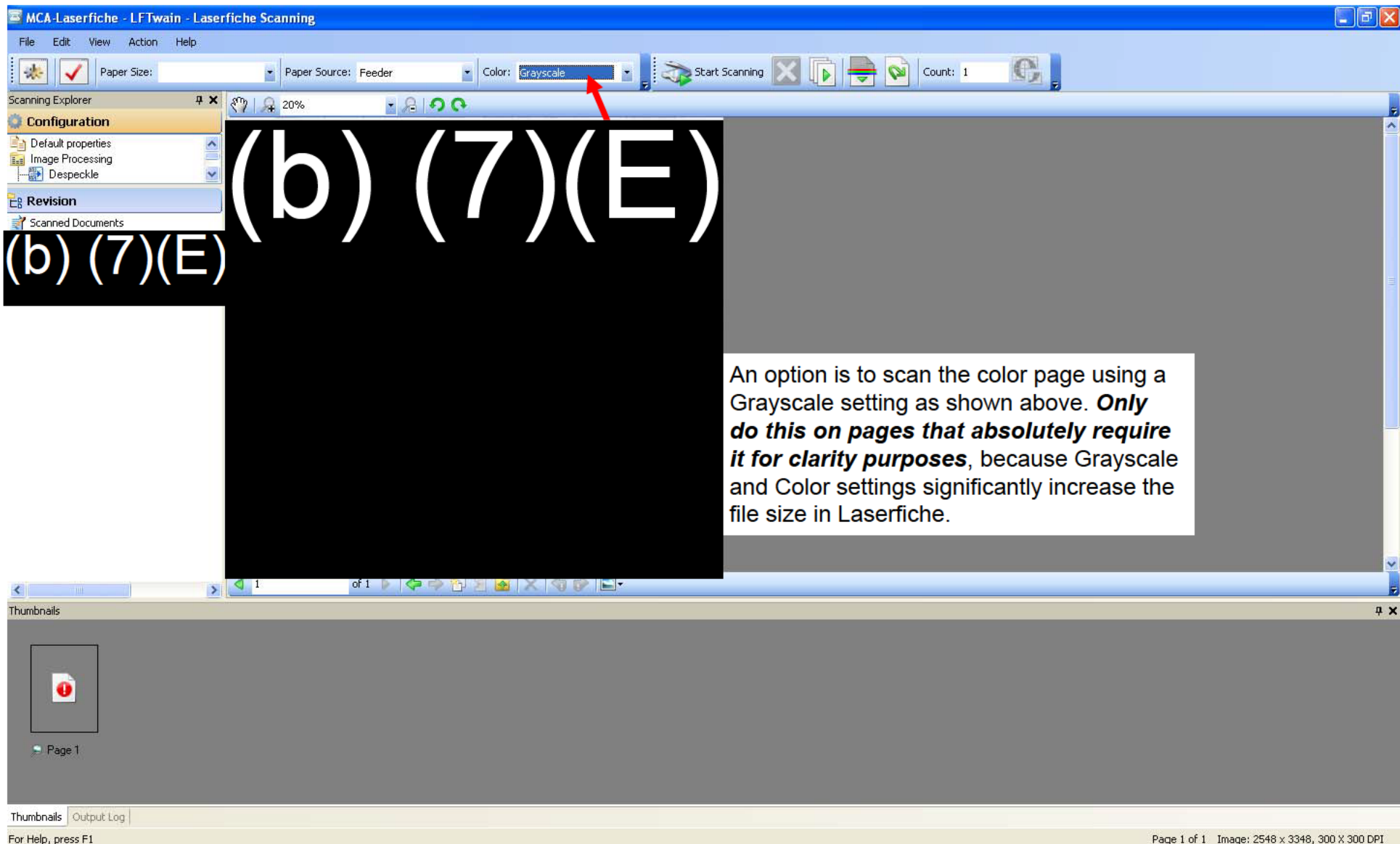


This is the default sample image. To add your own:

- 1. Select **Image Processing** in the left pane.**
- 2. Select **Import Sample Image** or **Scan Sample Image** in the right pane.**

The illustrated Image Processing options (Despeckle, Deskew and OmniPage OCR) should be selected to improve the quality of your scanned documents.





(b) (7)(E)



After successfully scanning your document, store it into Laserfiche using the store button.

Quality Control Requirements for Scanned Documents

- Laserfiche users shall perform an initial quality control check by reviewing the scanned document to make sure that all pages have been scanned, the document image is legible, the pages are straight, all pages are oriented in the same direction, and all pages are the proper size, etc. If this is not the case, the document, or specific pages, shall be rescanned until the document is legible and complete.

Unacceptable Documents

- Documents that do not comply with the scanning/importing requirements (legible, complete and retrievable), the document or relevant pages should be rescanned, re-imported and reviewed again to prevent document loss. When the re-work is successful, the defective electronic record must be deleted. Each office must stamp or hand write the following statement on every original page to be scanned that is illegible: “Due to the illegibility or condition of the source document, the electronic copy of this page may not be legible.”

Become more proficient!

- For additional information on Laserfiche settings and options, please refer to the [Laserfiche User's Reference Material](#) found in the (b) (7)(E) (b) (7)(E) folder in Laserfiche. Please use the information that pertains to the version installed on your workstation.

Working With Documents, Folders, and Shortcuts in the Laserfiche 8 Client

White Paper

September 2008

Laserfiche®

The information contained in this document represents the current view of Compulink Management Center, Inc on the issues discussed as of the date of publication. Because Compulink must respond to changing market conditions, it should not be interpreted to be a commitment on the part of Compulink, and Compulink cannot guarantee the accuracy of any information presented after the date of publication.

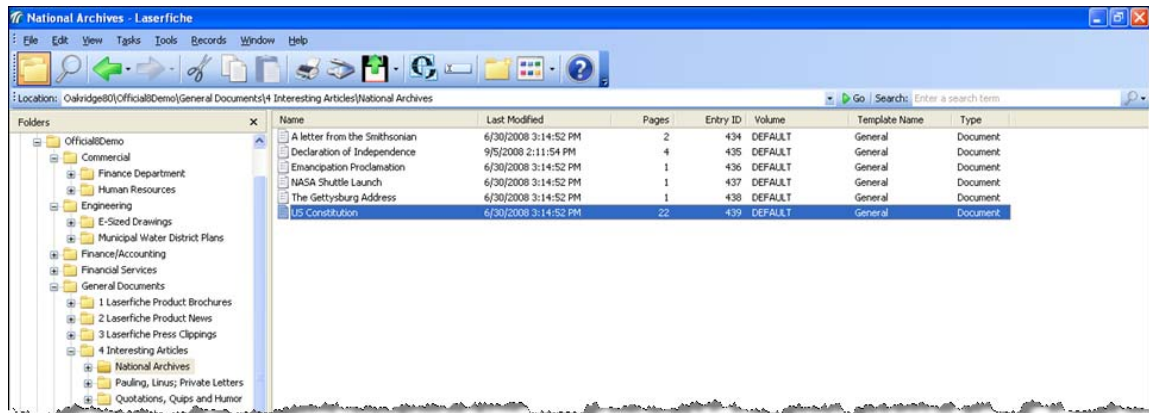
This chapter is for informational purposes only. COMPULINK MAKES NO WARRANTIES, EXPRESS OR IMPLIED, AS TO THE INFORMATION IN THIS DOCUMENT.

Table of Contents

Getting Around in Laserfiche.....	3
Components of the Folder Browser	3
Navigating the Folder Browser.....	4
Navigating the Folder Pane.....	4
Navigating the Contents Pane.....	5
Creating and Working With Folders and Documents.....	5
Creating a New Folder	5
Creating a New Document	6
Moving Folders and Documents.....	6
Copying Folders and Documents	7
Replicating a Folder Structure.....	7
Creating and Working with Shortcuts.....	8
Creating Shortcuts Within the Repository	8
Creating Shortcuts Outside the Repository	8
The Recycle Bin.....	9
Moving an Item to the Recycle Bin.....	10
Restoring an Item from the Recycle Bin.....	10
Purging an Item from the Recycle Bin.....	11
Viewing Documents	12
Types of Documents.....	12
Opening Imaged Documents	12
Opening Electronic Documents.....	12
Opening Document Metadata Only.....	13
Components of the Document Viewer	13
Image Pane.....	15
Zooming In and Out	15
Scrolling.....	16
Text Pane.....	16
Generating Text	17
Editing Text.....	17
Metadata Pane	17
Thumbnail Pane	18
Rotating Pages	18
Moving a Pages Within a Document.....	18
Moving a Page to Another Document.....	19
Copying Pages Within a Document	19
Copying Pages to Another Document	19
Deleting Pages.....	19
Splitting a Document into Multiple Documents.....	19

Getting Around in Laserfiche


When you open the Laserfiche Client software, you will first see the Folder Browser, which shows the arrangement of the folders in your repository. Here you can browse, search for, or organize documents.





Components of the Folder Browser




- The **Menu** and **Toolbar** contain options to help you work within the Folder Browser. The Folder Browser toolbar and keyboard shortcuts can be customized. With the Folder Browser open, select the **Tools** menu, **Options**, and **Toolbars**. Click **Customize Toolbar** to add buttons, change keyboard shortcuts, and set other preferences.

- The **Location Bar** just below the toolbar shows you the folder hierarchy for the selected folder and allows you to type in a path to go directly to a particular folder or document. 

- The **Quick Search Bar** allows you to perform a basic search throughout the repository without having to open the Search Pane. 

- The **Folder Pane** is on the left side of the Folder Browser. If it is not already open, it can be accessed by clicking the Folders button on the toolbar. 



- The **Search Pane** will also appear on the left side of the Folder Browser. When you click on the Search button in the toolbar, the Search Pane will replace the Folder Pane. 

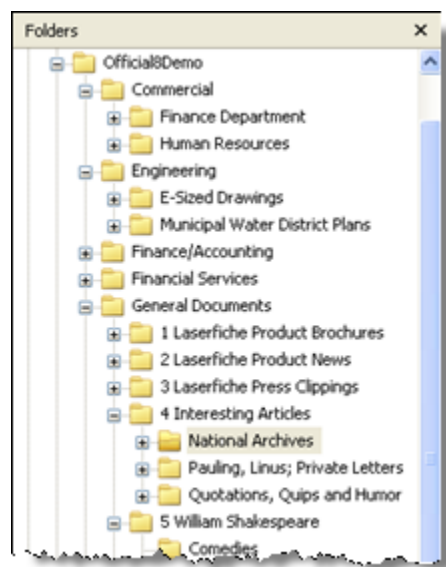
- The **Contents Pane** is on the right side of the Folder Browser. When you select a folder in the Folder Pane, you see its contents listed in the Contents Pane.

Navigating the Folder Browser

Documents in Laserfiche can be contained within folders, which may in turn be contained within other folders. The structure of folders is called a folder tree, and it is contained in a Laserfiche repository. In Laserfiche 8, you can log in to multiple repositories at once; they will all appear in the Folder Pane.

Navigating the Folder Pane


- The folder tree is shown in the Folder Pane. There are several different methods for moving between folders and repositories in the Folder Pane.
- Using the mouse within the Folder Pane, you can see subfolders by double-clicking the folder or repository or clicking once on the plus sign to the left of the folder icon.
- Using the keyboard within the Folder Pane, you can use the ENTER key to expand a folder and see its subfolders, and the UP and DOWN arrow keys to move between visible folders.
- With the Go Back and Go Forward arrow buttons on the toolbar, you can browse backward and forward through the history of folders you have previously viewed in the current Folder Browser.  
- From the **File** menu, select **Recent Documents** to access the last 11 documents you viewed.



Navigating the Contents Pane

When you have selected a folder, the documents and folders in that folder will be visible in the Contents Pane. You can navigate within the Contents Pane as in the Folder Pane.

Name	Last Modified	Pages	Entry ID	Volume	Template Name	Type
A letter from the Smithsonian	6/30/2008 3:14:52 PM	2	434	DEFAULT	General	Document
Declaration of Independence	9/5/2008 2:11:54 PM	4	435	DEFAULT	General	Document
Emancipation Proclamation	6/30/2008 3:14:52 PM	1	436	DEFAULT	General	Document
NASA Shuttle Launch	6/30/2008 3:14:52 PM	1	437	DEFAULT	General	Document
The Gettysburg Address	6/30/2008 3:14:52 PM	1	438	DEFAULT	General	Document
US Constitution	6/30/2008 3:14:52 PM	22	439	DEFAULT	General	Document

The View Style toolbar button allows you to customize the appearance of the Contents Pane. Rather than the default detail view, it can show small icons, large icons, a basic list without details, or thumbnails. 

In the detail view, you can reorder the columns by selecting a column header and dragging it left or right. You can also sort documents based on the column information by clicking on the column. For instance, clicking on the Last Modified column header will sort files by the date they were most recently modified. Click once to sort in ascending order and again to sort in descending order. To add or remove columns, right-click in the column header and select or deselect columns.

Creating and Working With Folders and Documents

When creating or adding to a folder structure, consider who will be accessing the documents. Make the filing and naming structure as self-explanatory as possible so that new employees or people who use the repository infrequently can easily access the documents. For tips, see the [System Design Best Practices in Laserfiche 8](#) white paper.

Your rights for actions such as creating, moving, and modifying folders and documents are determined by your Laserfiche administrator. Not all users may be able to perform all actions.

Creating a New Folder

To create a new folder, select the repository or folder you want the new folder to be inside, and do one of the following:

- From the **File** menu, select **New** and then **Folder**.
- Right-click and select **New** and then **Folder**.



- On the keyboard, press CTRL+N.
- Type the name you want to give the folder.

Creating a New Document

You can create a new document within the Folder Browser, rather than through importing or scanning. Documents created this way will not have any image, text, or electronic document pages, although pages can be added to them later. Empty documents are sometimes used as placeholders representing physical resources.

To create a new empty document:

1. Select the repository or folder you want the new folder to be inside, and do one of the following:
 - From the **File** menu, select **New** and then **Document**.
 - Right-click and select **New** and then **Document**.
 - On the keyboard, enter CTRL+D
2. Enter any metadata you wish to associate with the document.
3. Type the name you want to give the document.

To create a document by importing or scanning, see the help files or white papers on those subjects.

Moving Folders and Documents

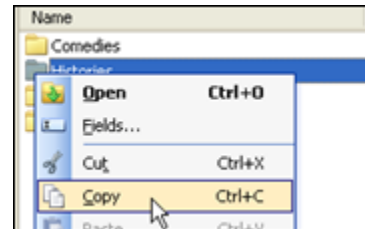
To move folders or documents, you can select and drag and drop them into the destination folder, just as you would in Windows Explorer. You can also use the **Cut** and **Paste** commands in the **Edit**



menu or the **Cut** and **Paste** toolbar buttons to remove a file from one location and place it in another. When you move a folder, all documents in that folder and all subfolders and their contents will be moved as well.

Copying Folders and Documents

When you copy a folder, it will retain all documents, subfolders, and their contents inside it. It will retain the volume and metadata information previously assigned to it, but the rights assigned to the folder are not copied to the new folder; they will be inherited from the new parent folder. You cannot copy a folder that has a document checked out for editing or copy a folder into one of its own subfolders. You can copy a folder into the same root folder; doing so will duplicate that folder and prompt you to rename it.

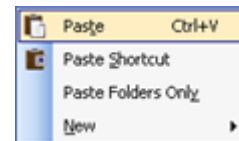


To copy a folder:

- Select it and do one of the following:
 - From the **Edit** menu, select **Copy**.
 - Right-click and select **Copy**.
 - Click the **Copy** button on the Folder Browser toolbar.
 - Press CTRL+C on the keyboard.

To paste the folder:

- Navigate to the new location and do one of the following:
 - From the **Edit** menu, select **Paste**.
 - Right-click and select **Paste**.
 - Click the **Paste** button on the Folder Browser toolbar.
 - Press CTRL+V on the keyboard.



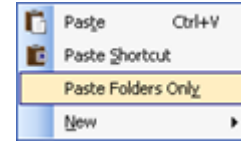
Individual documents can be copied in the same manner.

Replicating a Folder Structure

You can also copy a nested folder structure without copying the documents inside each folder. This option can be particularly useful if you need to easily reproduce standardized folder structures, such as a set of folders for a new employee, patient, or donor. The folder structure will retain volume and metadata information previously assigned to it. Rights will be inherited from the new parent folder.

To reproduce a folder structure:

1. From the Folder Browser, select the top folder of the folder structure you want to reproduce.
2. Select **Copy** from the **Edit** menu or right-click and select **Copy**.
3. Navigate to the folder structure's new location.
4. Select **Paste Folders Only** from the **Edit** menu or right-click and select **Paste Folders Only**. Click **Yes** to reproduce the folder structure.
5. The folder structure will appear as a copy of the original, without any documents inside.



Creating and Working with Shortcuts

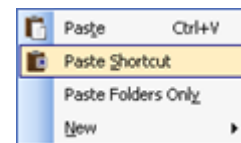
A shortcut is a pointer to a document or folder in the repository. Shortcuts allow you to store a document in one place in a repository, but access it from elsewhere. Shortcuts can be e-mailed to people with access to the same repository.

Creating Shortcuts Within the Repository

Creating shortcuts inside your repository can help you create file structures that meet different needs within your organization while maintaining consistent organization. For instance, you might store all the environmental impact reports for various construction projects in an Environmental Reports folder, but place shortcuts in the folders for each project, so the people working on each project can quickly access the relevant documents.

To create a shortcut to a document or folder:

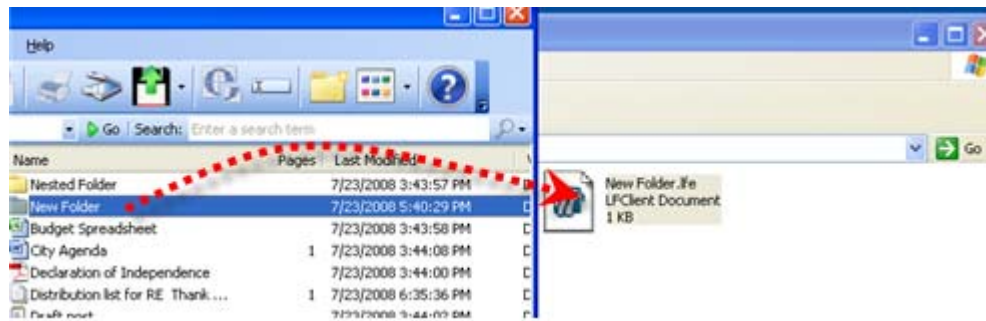
1. Select **Copy** from the **Edit** menu or right-click and select **Copy**.
2. Navigate to the folder where you want to create the shortcut.
3. Select **Paste Shortcut** from the **Edit** menu or right-click and select **Paste Shortcut**.



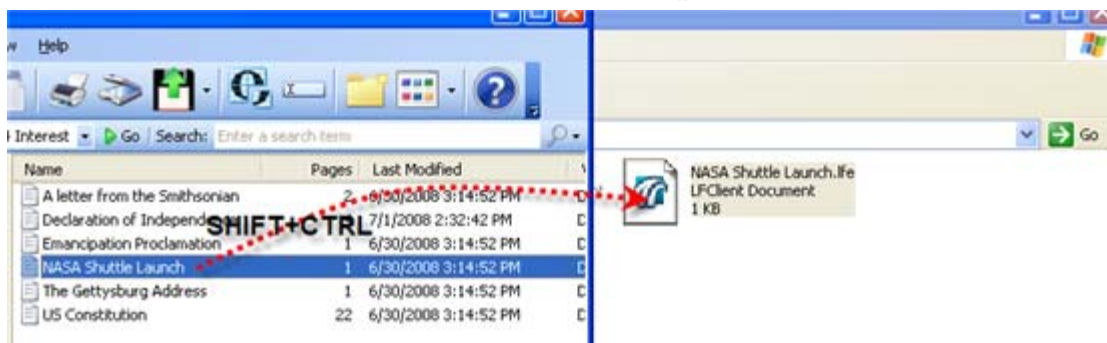
Creating Shortcuts Outside the Repository

Shortcuts can also be made in a Windows Explorer window (e.g., the desktop) to documents and folders within Laserfiche. Opening the shortcut will open Laserfiche directly to that document or folder.

To create desktop shortcuts to Laserfiche:



- To create a shortcut to a **folder**, drag and drop the folder from the Laserfiche Folder Browser to Windows Explorer.



- To create a shortcut to a **document**, press CTRL+SHIFT while you drag and drop the document from Laserfiche to Windows Explorer.

Note: Dragging and dropping a document to Windows Explorer without pressing CTRL+SHIFT will export the document as a PDF, or whatever format your default export settings are configured for.

The Recycle Bin

The Laserfiche Client recycle bin is a special folder that always remains at the bottom of the repository's folder tree. When the recycle bin is enabled by your Laserfiche administrator, all deleted documents will first go to the recycle bin before being permanently removed from the repository. This protects against accidental deletion.

When you open the recycle bin, you will see a list of all the entries currently in the recycle bin that you deleted. You will not be able to view, open, or otherwise modify the document or its metadata while it is in the recycle bin. You can restore documents, or, if you have the appropriate privilege, permanently purge documents.

The time a document will remain in the recycle bin before it is permanently deleted is configured by your Laserfiche administrator. By default, documents

are permanently purged from the recycle bin after seven days, but this may be different at your Laserfiche installation.

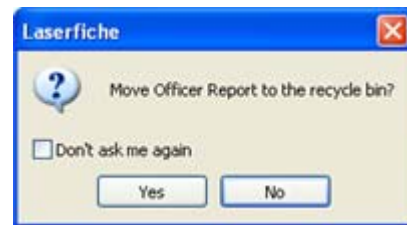
Moving an Item to the Recycle Bin

Deleting an item within the Folder Browser will send it to the recycle bin. Sending a document to the recycle bin will break any document links or version information between that document and other documents in the repository. Restoring the document will not restore the link or version information, although all other metadata and security information will be retained.

When you delete a document or a folder, you will also delete every shortcut to that item. However, deleting a single shortcut will not affect the corresponding document, folder, or other shortcuts. Shortcuts cannot be moved to the recycle bin. If a shortcut is deleted, it cannot be restored.

To move an item to the recycle bin:

1. Select the document or folder you want to move to the recycle bin.
2. Do one of the following:
 - Press the DELETE key.
 - From the **File** menu, select **Delete**.
 - Drag and drop the item to the recycle bin in the Folder Pane.
3. When prompted, click **Yes** to confirm that you have moved the entry to the recycle bin.

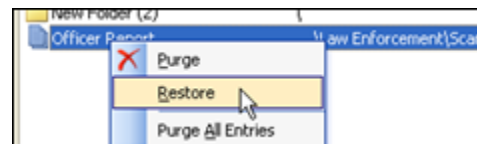


Restoring an Item from the Recycle Bin

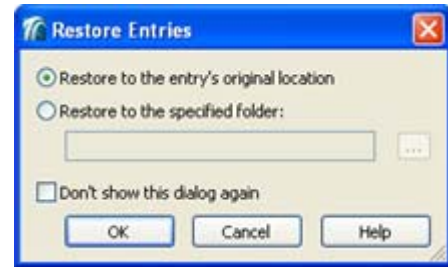
All users can retrieve documents they have moved to the recycle bin themselves, until those documents have been purged. If the entry is a folder, its contents cannot be individually restored; the folder must be restored to access its contents. When an entry is restored, its metadata and security information will be restored with it. If an entry is restored to a new folder or a folder whose security settings have changed, it will inherit the new security settings from the parent folder.

To restore an entry from the recycle bin:

1. Open the recycle bin.
2. Select the entry or entries you want to restore.
3. Right-click and select **Restore** to open the **Restore Entries** dialog box.



4. Choose either to restore the entry to its original location or to a different, specified folder. Note that you must have the appropriate rights to create a document in that folder if you choose a new folder. The entry will inherit rights from the folder to which you move it.
5. Click **OK** to restore the entry or entries.



Purging an Item from the Recycle Bin

To purge, or permanently delete, items you have moved to the recycle bin, you must have the **Purge Entries** privilege, which is configured by a Laserfiche administrator. Laserfiche administrators with the appropriate privileges can also restore or purge items that various users have moved to the recycle bin.

To delete an item permanently:

1. Move the document or folder to the recycle bin.
2. Open the recycle bin.
3. Select the item you want to permanently delete.
4. Right-click the item and select **Purge**.
5. To purge all items in the recycle bin, right-click and select **Purge All Entries**.



Tip: Another way to delete an item permanently is to select the item in the Folder Browser and press SHIFT+DELETE. You will be prompted to confirm that you want to permanently delete the entry.

Viewing Documents

Laserfiche documents can contain several different types of information, including images, text, annotations, and metadata. The Document Viewer allows you to work with all of these kinds of information for each document. The Document Viewer is a new window separate from the Folder Browser.

Types of Documents

Laserfiche stores two basic types of documents:

- **Imaged documents:** image pages and text. Laserfiche uses the TIFF (Tagged Image File Format) image encoding format, a non-proprietary file type that can be opened in most image viewing programs.
- **Electronic documents:** a file of another format, such as a Word document or Excel spreadsheet.

Opening Imaged Documents

Imaged documents will always be viewed in the Document Viewer.

To open an imaged document:

- Select it in the Folder Browser and do one of the following:
 - From the **File** menu, select **Open**.
 - Right-click and select **Open**.
 - Press CTRL+O on the keyboard.

Opening Electronic Documents

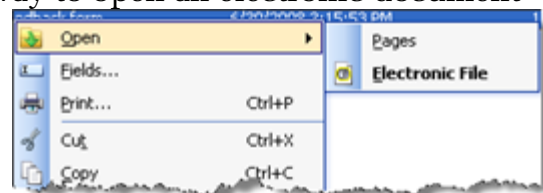
Laserfiche users can choose to view electronic documents in the native (third-party) format or in the Document Viewer.

Opening Electronic Documents in their Native Format

By default, double-clicking on an electronic document in the repository will open it in its native file format. Another way to open an electronic document in its native format is to right-click the document, point to **Open** and select **Electronic File**.

Opening Electronic Documents in the Document Viewer

Electronic documents can also be opened in the Document Viewer. This will *not* open the electronic file, but will allow you to view any extracted text, as



well as the document's metadata. If you have created images of the electronic file using Snapshot, those images will also be included and displayed.

To open an electronic document in the Document Viewer:

1. Select the document
2. Right-click the document and click **Open** and **Pages**.

You can configure the default settings for your Laserfiche Client so electronic documents will open in the Document Viewer rather than their native application when double-clicked.

To change the default view for electronic documents:

1. In the Laserfiche Client, select **Options** from the **Tools** menu.
2. Select **View** and **Open With**.
3. Under **Open With**, select either:
 - **The associated application** to have electronic documents launch in their native application by default.
 - **Standard document display** to have electronic documents open in the Document Viewer by default.
4. **Optional:** Under **Open zero-page documents using**, select whether opening documents will open only the **Metadata** dialog box or the standard view in the Document Viewer.
5. Click **OK**.

Opening Document Metadata Only

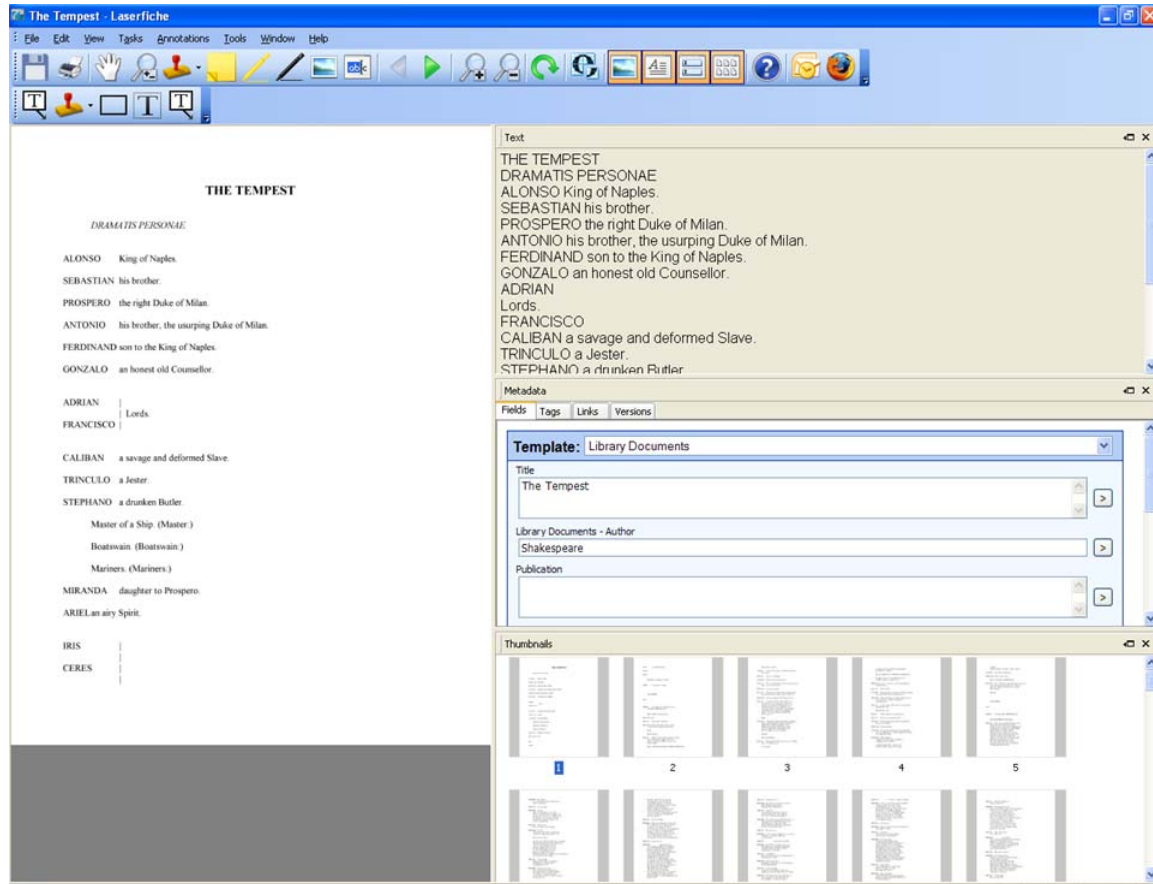


To open only the metadata window of an imaged or electronic document without opening the entire document, select the document and click the **View Fields** button in the Folder Browser toolbar.

Components of the Document Viewer

In the Document Viewer, you can view and modify Laserfiche documents, according to the rights assigned to you by your Laserfiche administrator.

The Document Viewer has a menu and toolbar featuring options specific to the Document Viewer. The Document Viewer toolbar and keyboard shortcuts can be customized. With the Document Viewer open, select the **Tools** menu, **Options**, and **Toolbars**. Click **Customize Toolbar** to add buttons, change keyboard shortcuts, and set other preferences.



The Document Viewer consists of four sections: the Image Pane, the Text Pane, the Fields Pane, and the Thumbnails Pane. You can open some or all of the four possible panes. To open these panes, click the appropriate toolbar buttons or select the view you want from the **View** menu. To close the panes, click on the toolbar buttons again, or, if three or more windows are open at the same time, click on the “X” in the top right corner of the pane itself. The panes can be resized to your liking; use the mouse to drag the borders to the size you want.

You can also undock a pane by clicking the **Undock** button in the pane’s upper right-hand corner. This will open the pane in a new window. To re-dock the pane, click the menu in the upper left corner of the window and select **Dock**.



Use the **Previous Page** and **Next Page** buttons on the Document Viewer toolbar to move from page to page in the imaged document and the associated text simultaneously.



Image Pane

You can view the TIFF images associated with a document in the Image Pane. The Image Pane displays one page at a time, and shows both the image itself and any annotations—such as highlights or sticky notes—that users have applied to the image. For more information on annotations, see the [Laserfiche 8 Annotations](#) white paper.



Zooming In and Out

By zooming, you can take a closer look at sections of the image or get a broader view of the whole image.

To zoom:

- Press CTRL while holding down the mouse button and dragging to select and zoom in on a section of the document in the Image Pane. Double-click anywhere on the image to zoom back out.
- Select the **Zoom** tool from the Document Viewer toolbar. Using the **Zoom** tool, click on the image to zoom in, and, if your mouse has a scroll wheel, scroll up to zoom in or down to zoom out.



- Use the **Zoom In** and **Zoom Out** buttons on the Document Viewer toolbar.



Scrolling

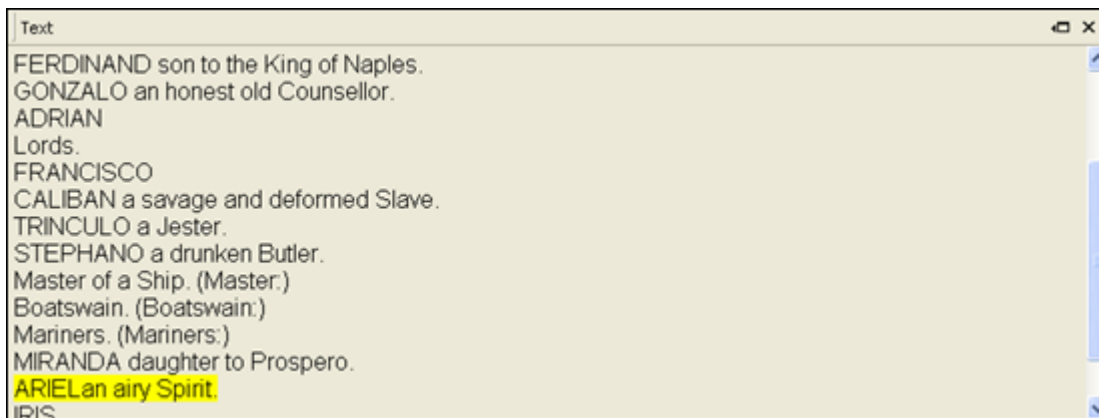
If the image you're viewing is bigger than your screen, you can scroll up and down to view the whole image.

There are a few different ways to scroll:

- Use the scrollbar on the right side of the image. The scrollbar appears if the image is larger than the Image Pane.
- If you are using any cursor tool except **Zoom**, use the mouse scroll wheel to scroll up or down.
- If you are using a scroll wheel, you can configure your settings so that you can scroll through all the pages of the document with the scroll wheel. To do so, select **Options** from the **Tools** menu, select **View** and **General**, and select **Page scrolling**.
- Select the **Panning** tool from the Document Viewer toolbar. Use it to click on the image and drag the image around inside the Image Pane.



Text Pane



The Text Pane contains text associated with the document. Most of the time, this will be text that has been read from the images pages by an optical character recognition (OCR) process (“OCRd”) or extracted from an electronic document. Some annotations can be added directly to text, just as they can be added to the image.

Generating Text

There are two fundamental methods to generate text from a document. If the document has image pages, you can perform OCR to “read” the text from the image. If the document has certain types of electronic files associated with it, such as a Microsoft Word document, you can extract text from the electronic document directly. If there is already text associated with the document—if it has already been OCR'd or had text extracted from it—generating text again will overwrite any existing text.



The **Generate Text** button will perform OCR on an imaged document or extract text from an electronic document. With either kind of document open in the Document Viewer, use this button to generate text. Once you have generated text from a document, you can view that text in the Text Pane of the Document Viewer.

Editing Text

By default, the Text Pane is grayed out so the text cannot be accidentally changed. However, you can turn on text editing, which will allow you to change the text directly. This can be useful for repairing errors in the OCR; for instance, if a customer's name was misread by the OCR, but you wanted it to be searchable, you could modify the text so the name was correctly spelled.

To turn text editing on or off:

- Select **Edit Text** from the **Tasks** menu.
- Click the **Edit Text** button on the Document Viewer toolbar.



Metadata Pane

A screenshot of the Metadata Pane window. The window has a title bar 'Metadata' and four tabs: 'Fields', 'Tags', 'Links', and 'Versions'. The 'Fields' tab is selected. Inside the pane, there is a 'Template:' dropdown menu set to 'Library Documents'. Below it, there are three text input fields: 'Title' with the value 'The Tempest', 'Library Documents - Author' with the value 'Shakespeare', and 'Publication' which is empty. Each field has a right arrow button next to it.

The Metadata Pane displays and allows you to modify additional information relevant to the document. It contains four tabs: Fields, Tags, Links, and Versions. For more information on working with these types of document metadata, see the Laserfiche Client help files or additional white papers.

Thumbnail Pane

The Thumbnail Pane allows you to see multiple pages of your document simultaneously. You can scan through the entire document quickly, locate, and open pages. To open a page from the Thumbnail Pane, double-click the thumbnail image.

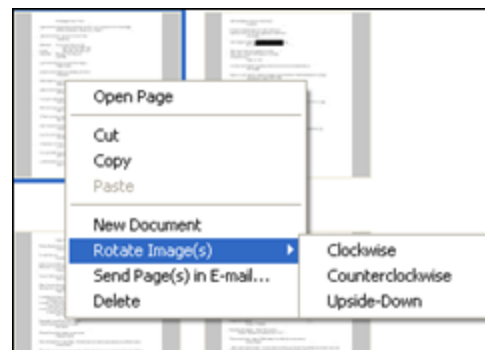


You can also use the Thumbnail Pane to modify documents and individual pages in certain ways.

Rotating Pages

To rotate one or more pages:

1. Select the page or pages in the Thumbnail Pane.
2. Right-click the pages.
3. Select **Rotate Image(s)**.
4. Choose **Clockwise**, **Counterclockwise**, or **Upside-Down**.



Moving a Pages Within a Document

To re-order pages within a document, select the thumbnails of the pages and drag and drop them in the new location. You can also right-click the thumbnails and select **Cut** and **Paste**, or use the commands on the **Edit** menu.

Moving a Page to Another Document

You can move pages from one document to another. Open another Document Viewer and drag the pages from one Thumbnail Pane to the other. You can also right-click the thumbnails and select **Cut** and **Paste**, or use the commands on the **Edit** menu.



Copying Pages Within a Document

To create multiple copies of the same page within a document, right-click the thumbnails of the pages you want to copy, select **Cut**, right-click again, and select **Paste**. Or you can use the commands on the **Edit** menu.

Copying Pages to Another Document

You can copy pages to another document, and the original pages will remain in the original document. Select the page or pages, right-click, and select **Copy**, or use the commands on the **Edit** menu. Open another Document Viewer, right-click in the Thumbnail Pane where you want to place the pages, and select **Paste**.

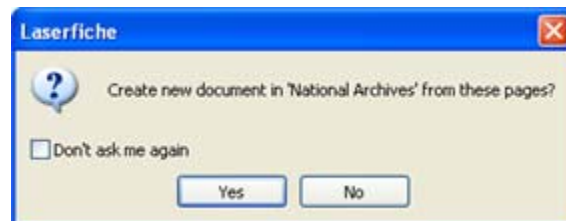
Deleting Pages

Deleting pages in the Document Viewer will permanently delete the pages. They will not go to the recycle bin and cannot be restored. To delete a page, right-click it and select **Delete** or select **Delete Pages** from the **File** menu.

Splitting a Document into Multiple Documents

You can also split one document into multiple documents from the Thumbnail Pane. This will remove the selected page or pages and create a new document containing those pages. Both image and text pages, and any annotations on them, will be moved to the new document.

To split a document from the Thumbnail Pane, select the relevant page or pages, and either right-click the pages or press CTRL+D. The **New Document** dialog box will open and allow you to configure the new document.





Working With Documents, Folders, and Shortcuts in the Laserfiche 8 Client
September 2008

Author: Snow Tempest and Constance Anderson

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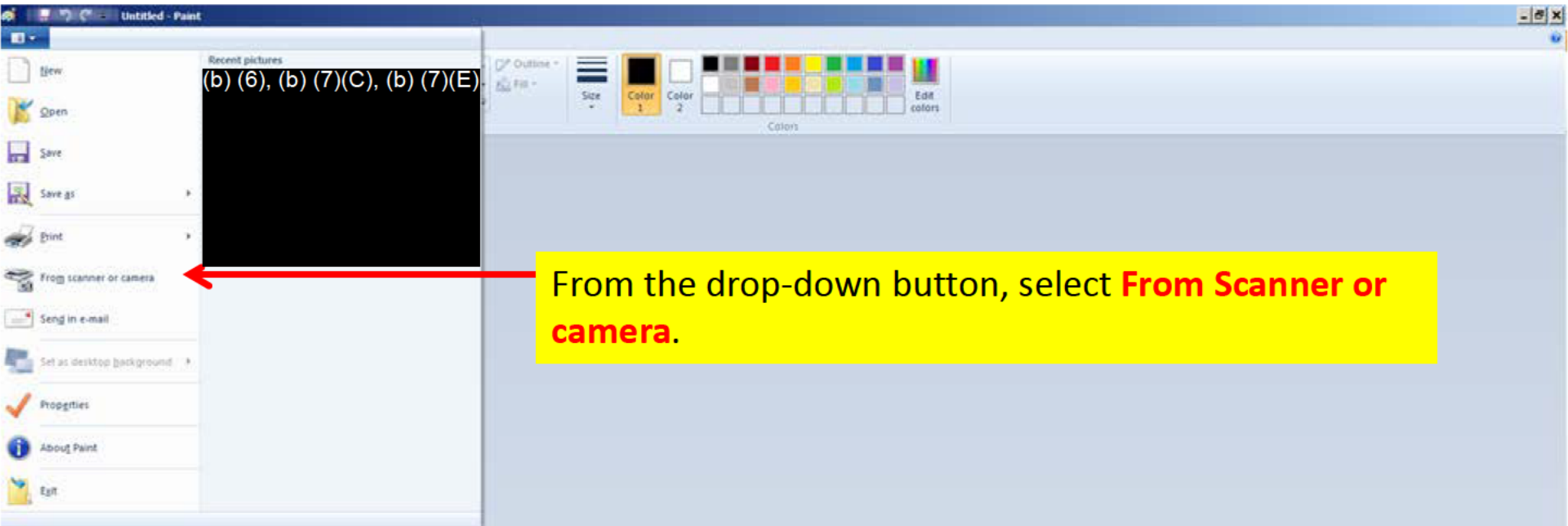
Phone: +1.562.988.1688
www.laserfiche.com

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and service names mentioned may be trademarks of their respective owners.

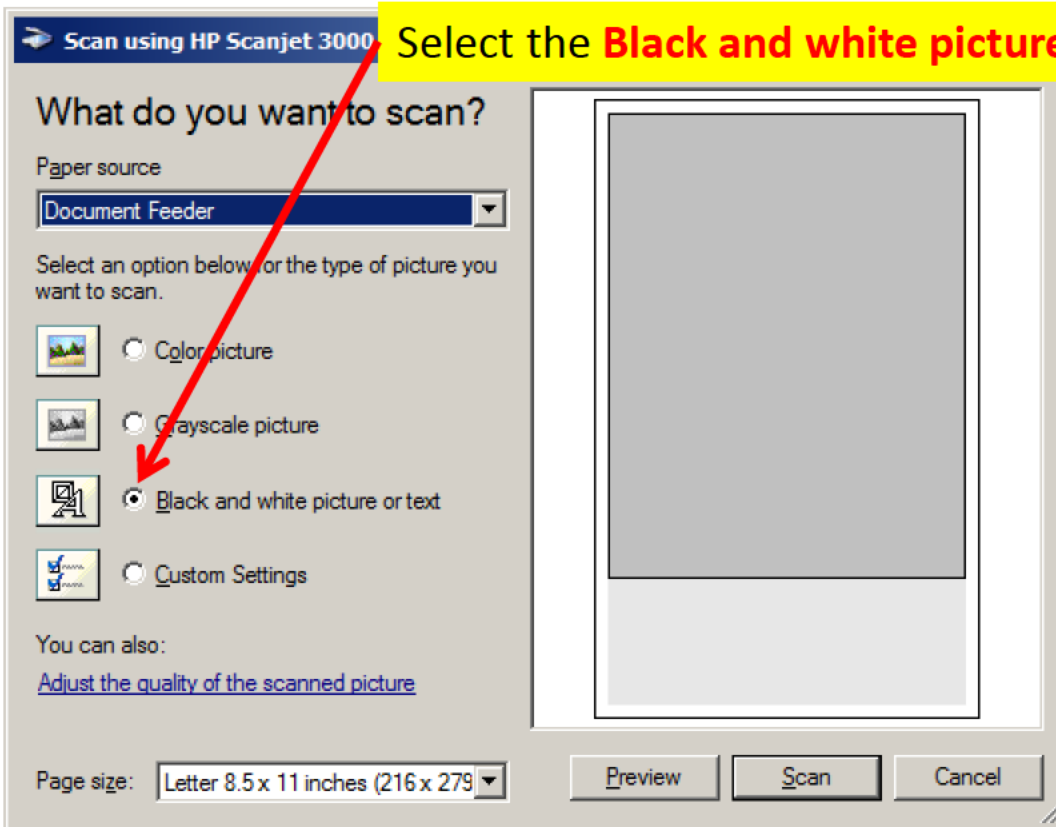
Copyright © 2008 Compulink Management Center, Inc.
All rights reserved

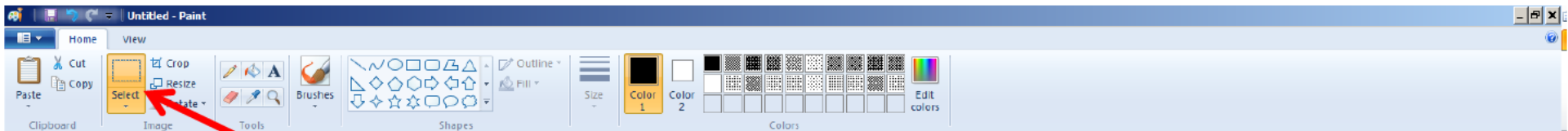


Place your signature on a plain sheet of white paper with a dark pen (Sharpie marker works best). Open up Paint in order to scan your signature and create a file.



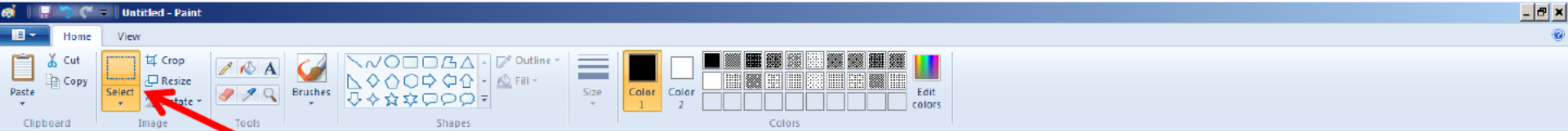
From the drop-down button, select **From Scanner or camera**.



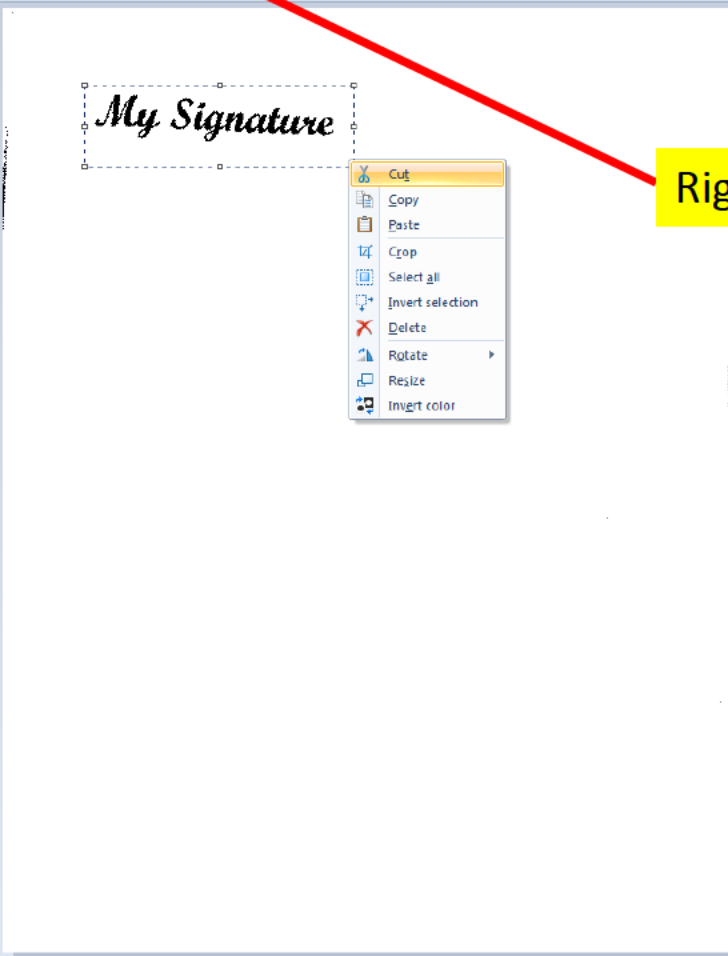


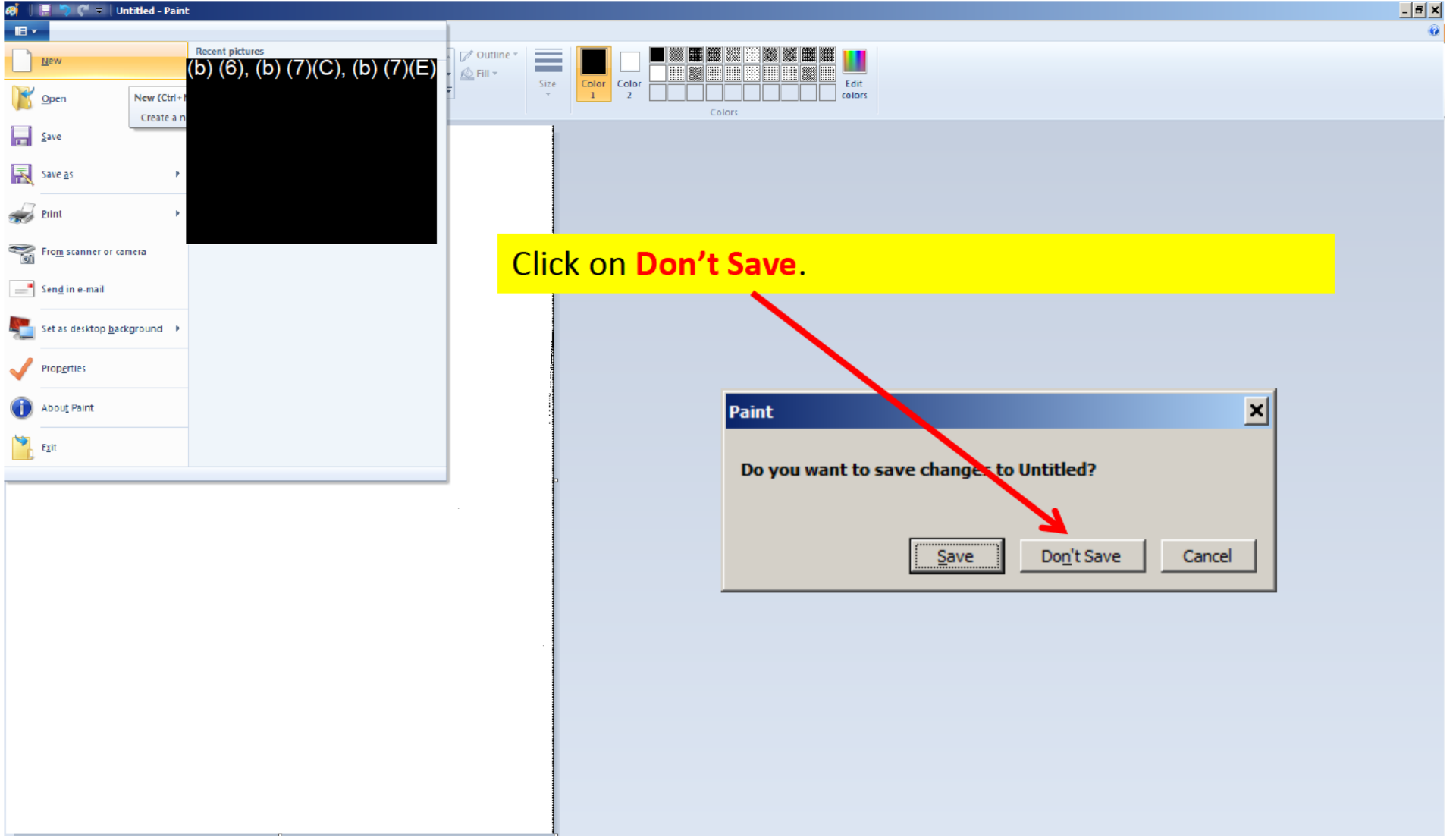
My Signature

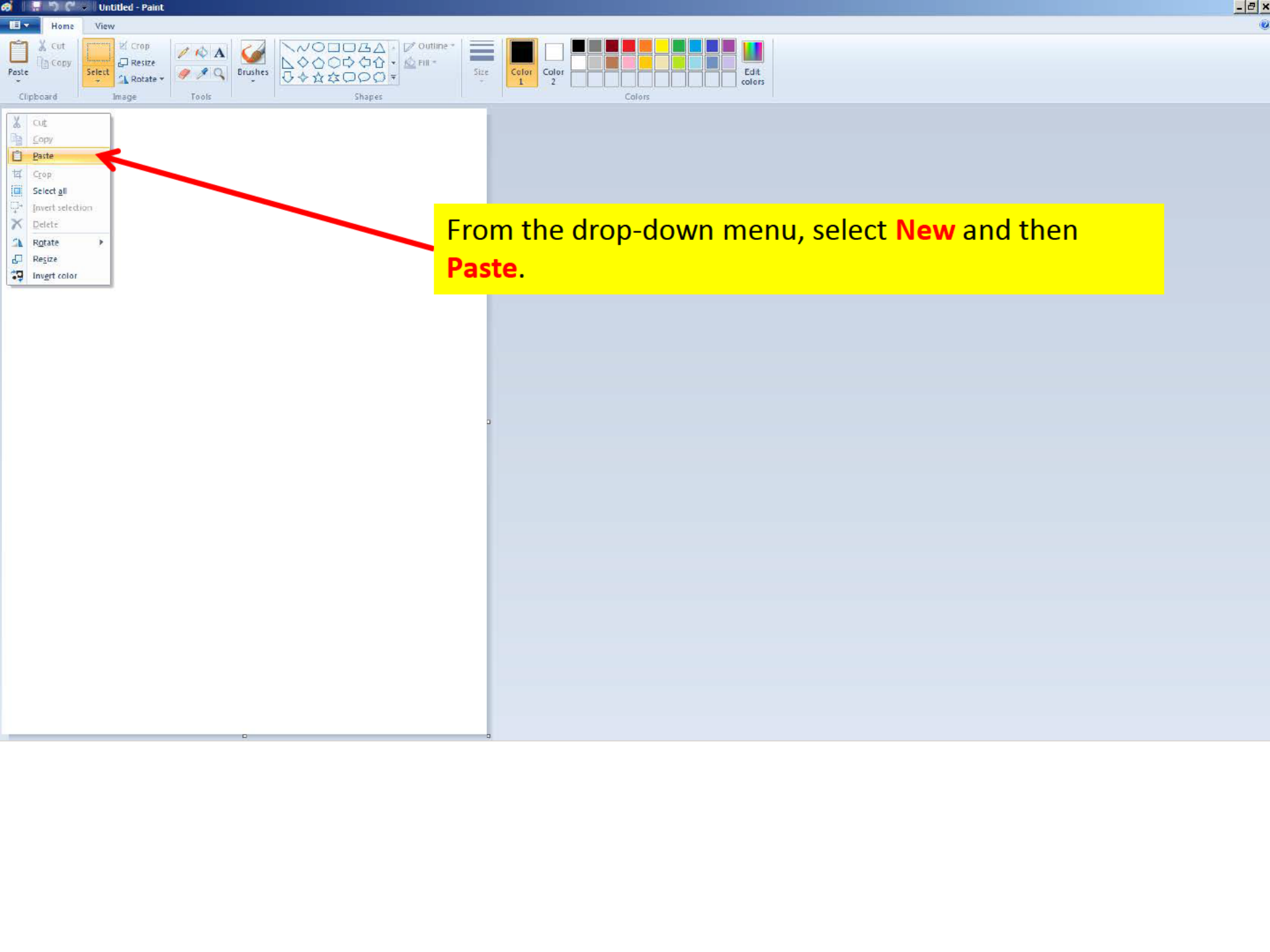
Once the document has been scanned, click on the **Select** button and draw a rectangle around your name.



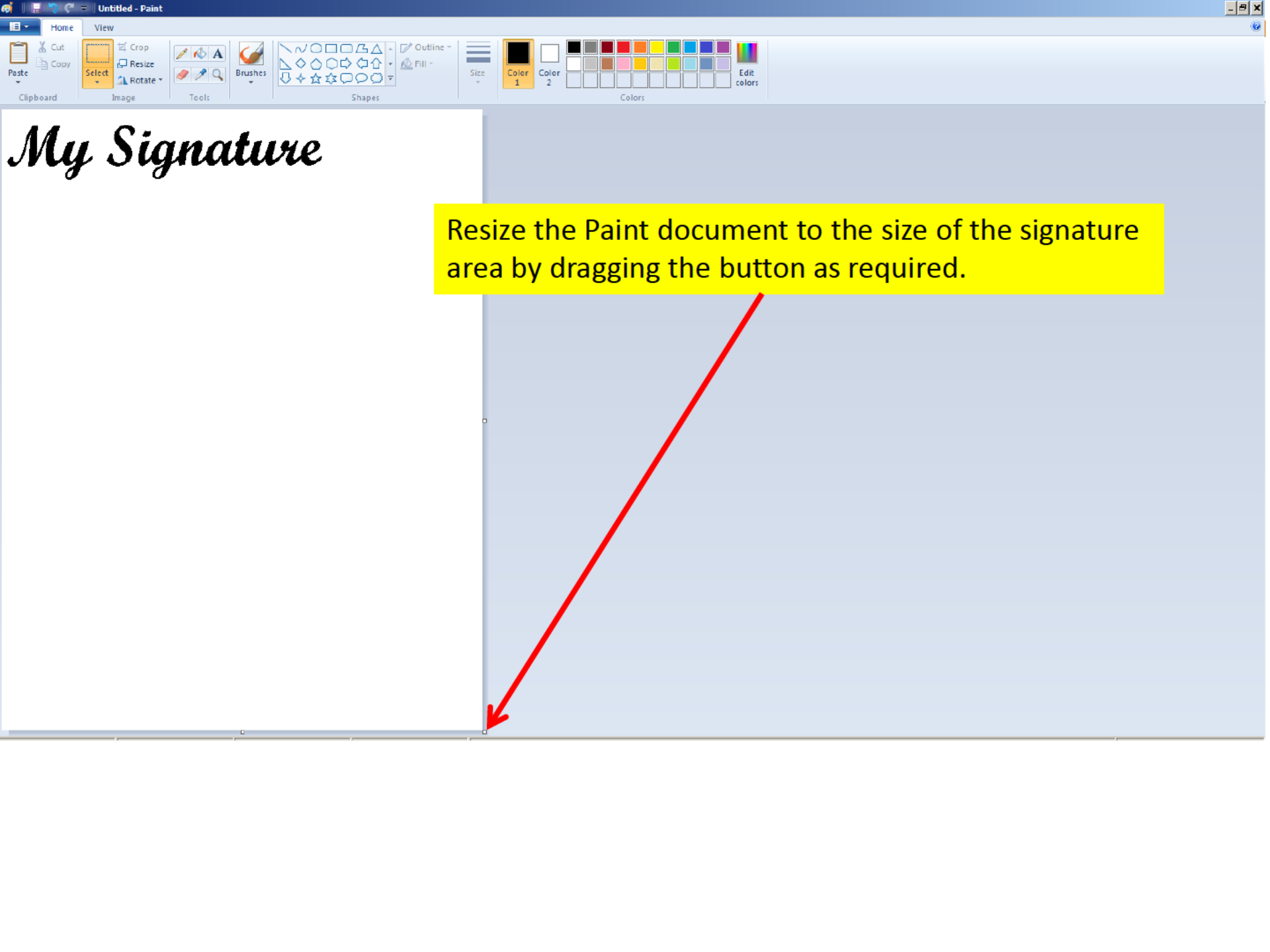
Right-click within the rectangle and select **Cut**.





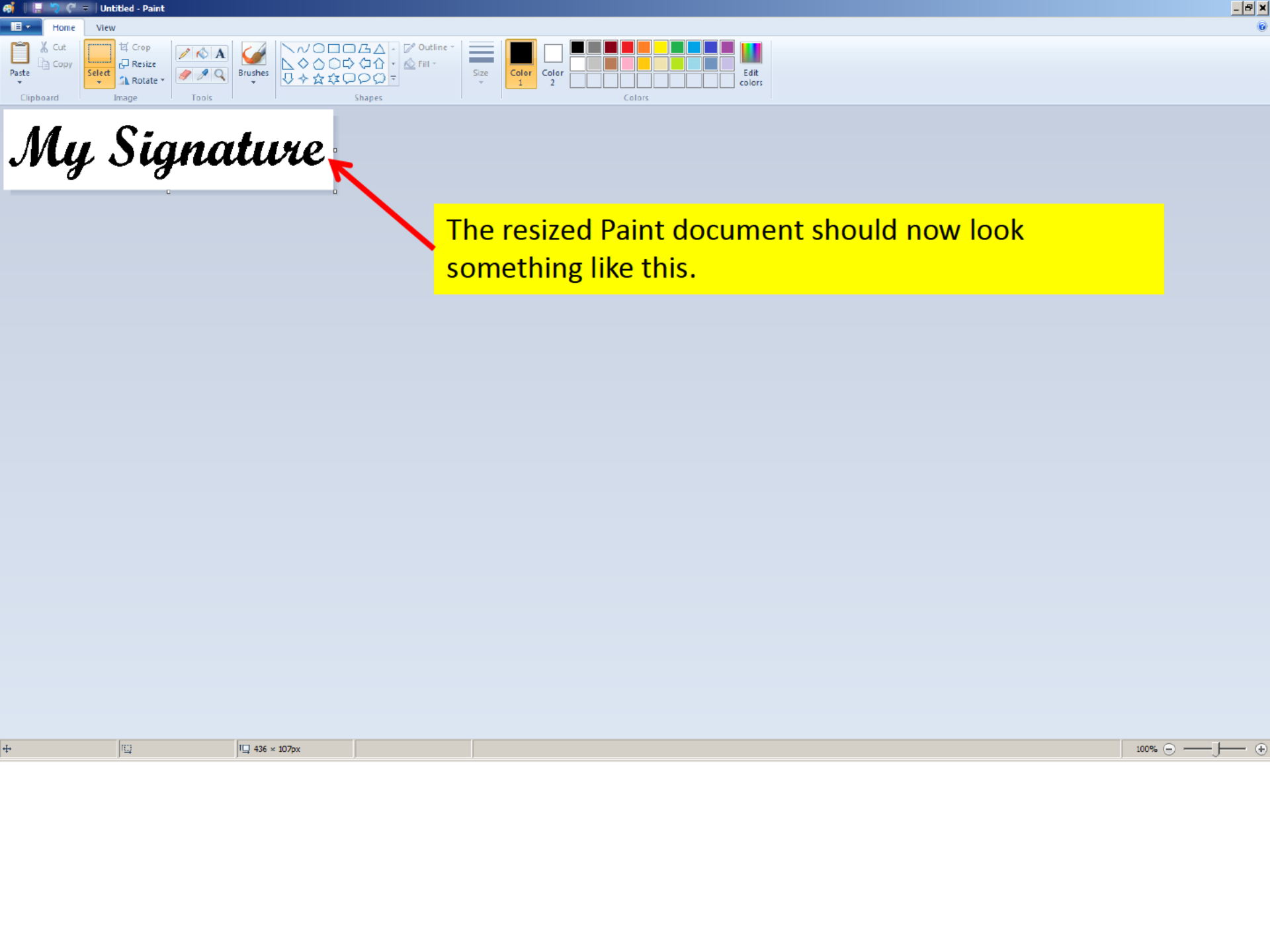


From the drop-down menu, select **New** and then **Paste**.



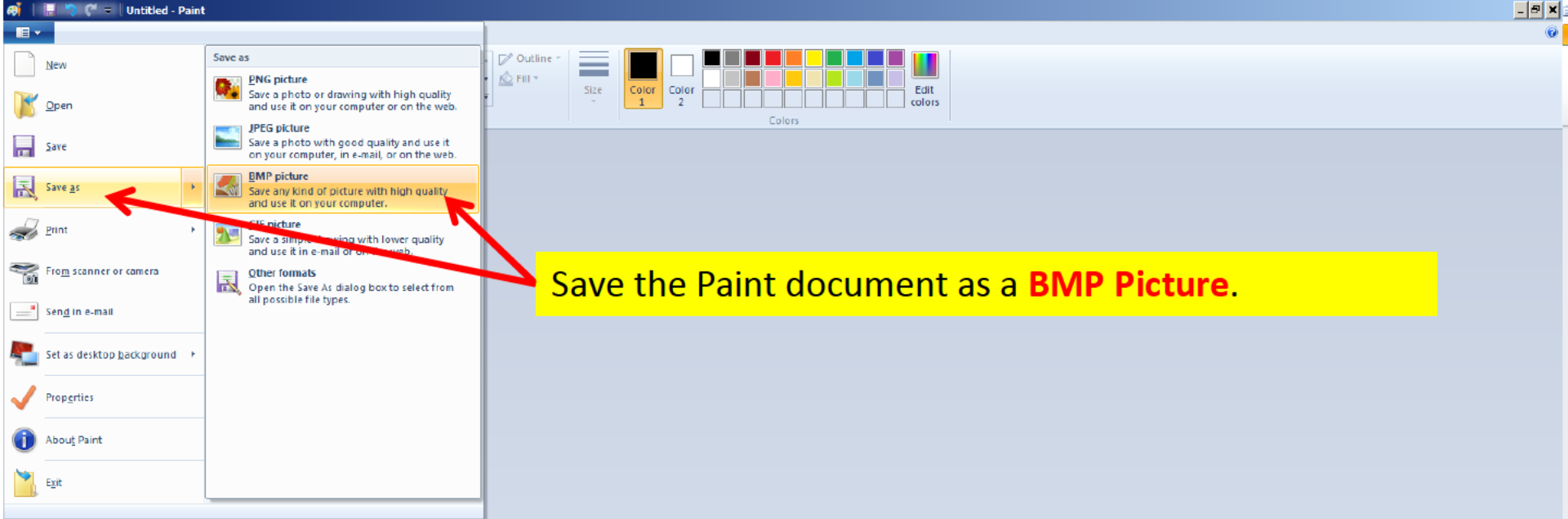
My Signature

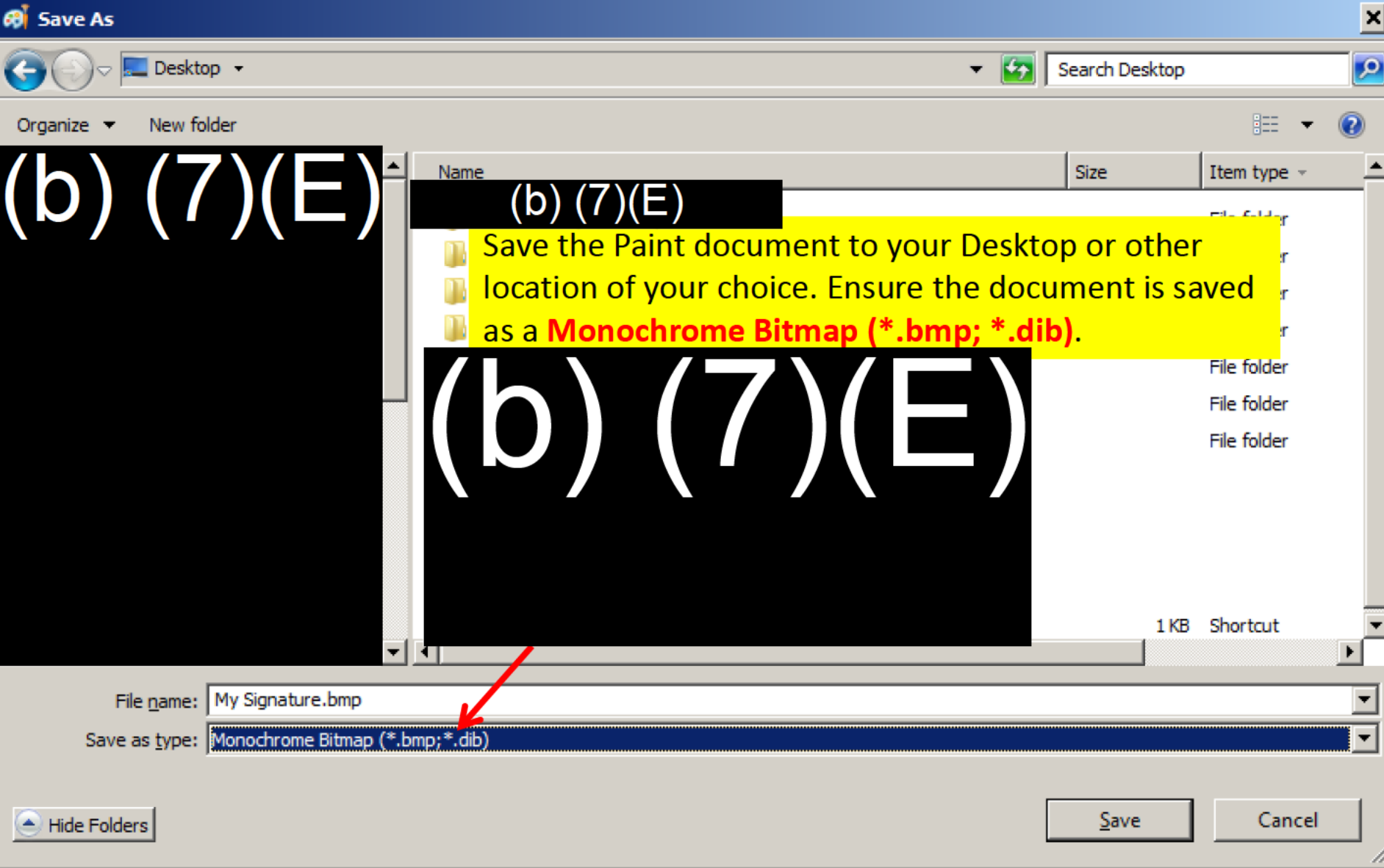
Resize the Paint document to the size of the signature area by dragging the button as required.



My Signature

The resized Paint document should now look something like this.





(b) (7)(E)

(b) (7)(E)

Save the Paint document to your Desktop or other location of your choice. Ensure the document is saved as a **Monochrome Bitmap (*.bmp; *.dib)**.

(b) (7)(E)

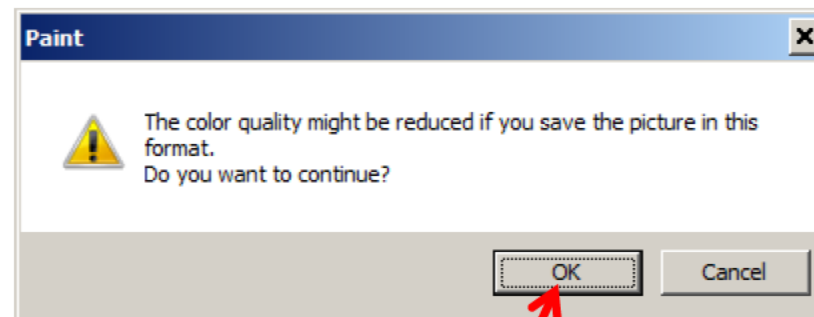
File name: My Signature.bmp

Save as type: Monochrome Bitmap (*.bmp; *.dib)

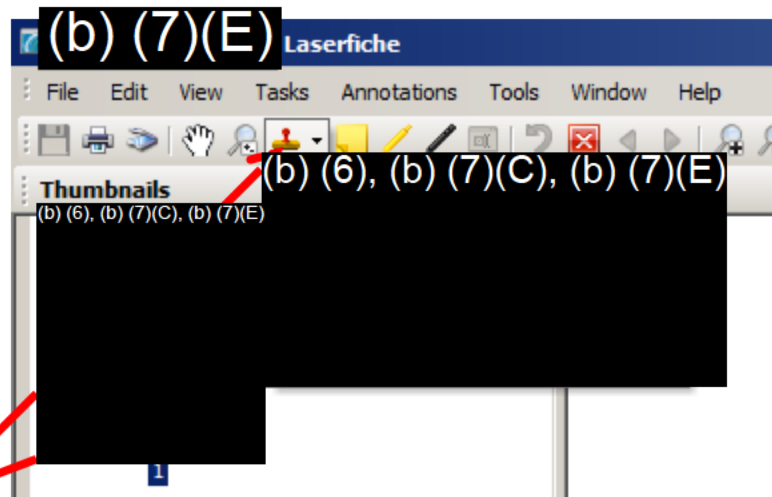
Hide Folders

Save

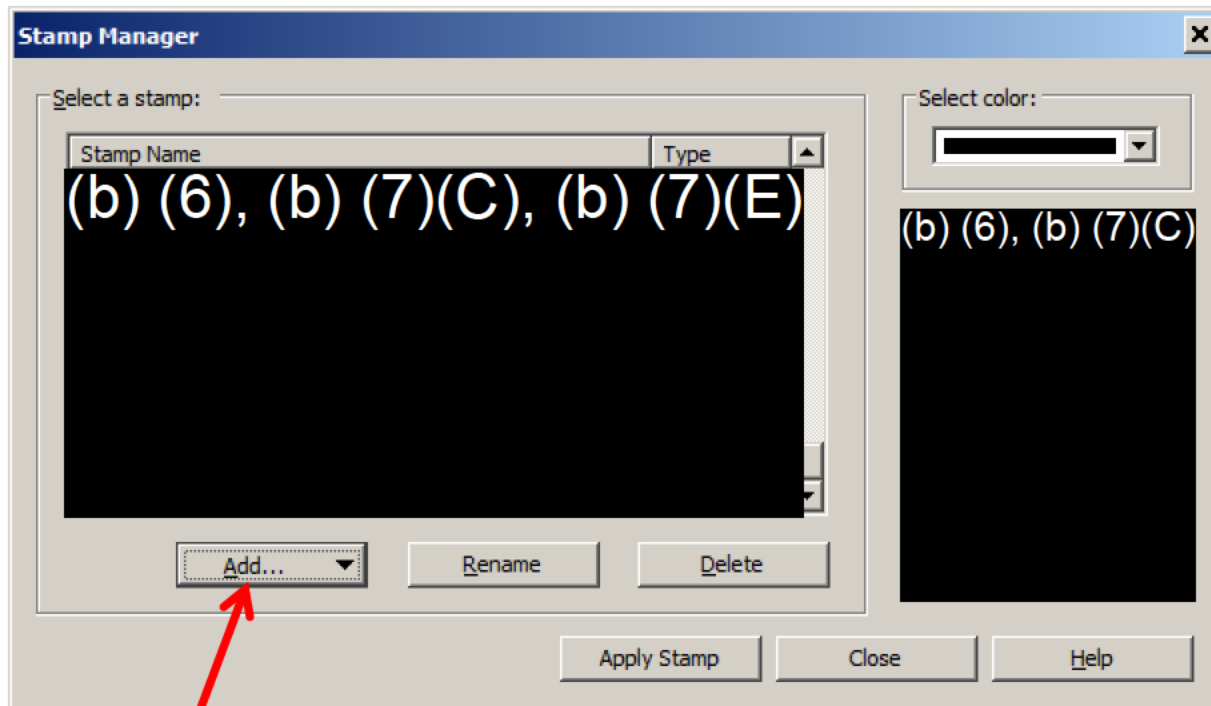
Cancel



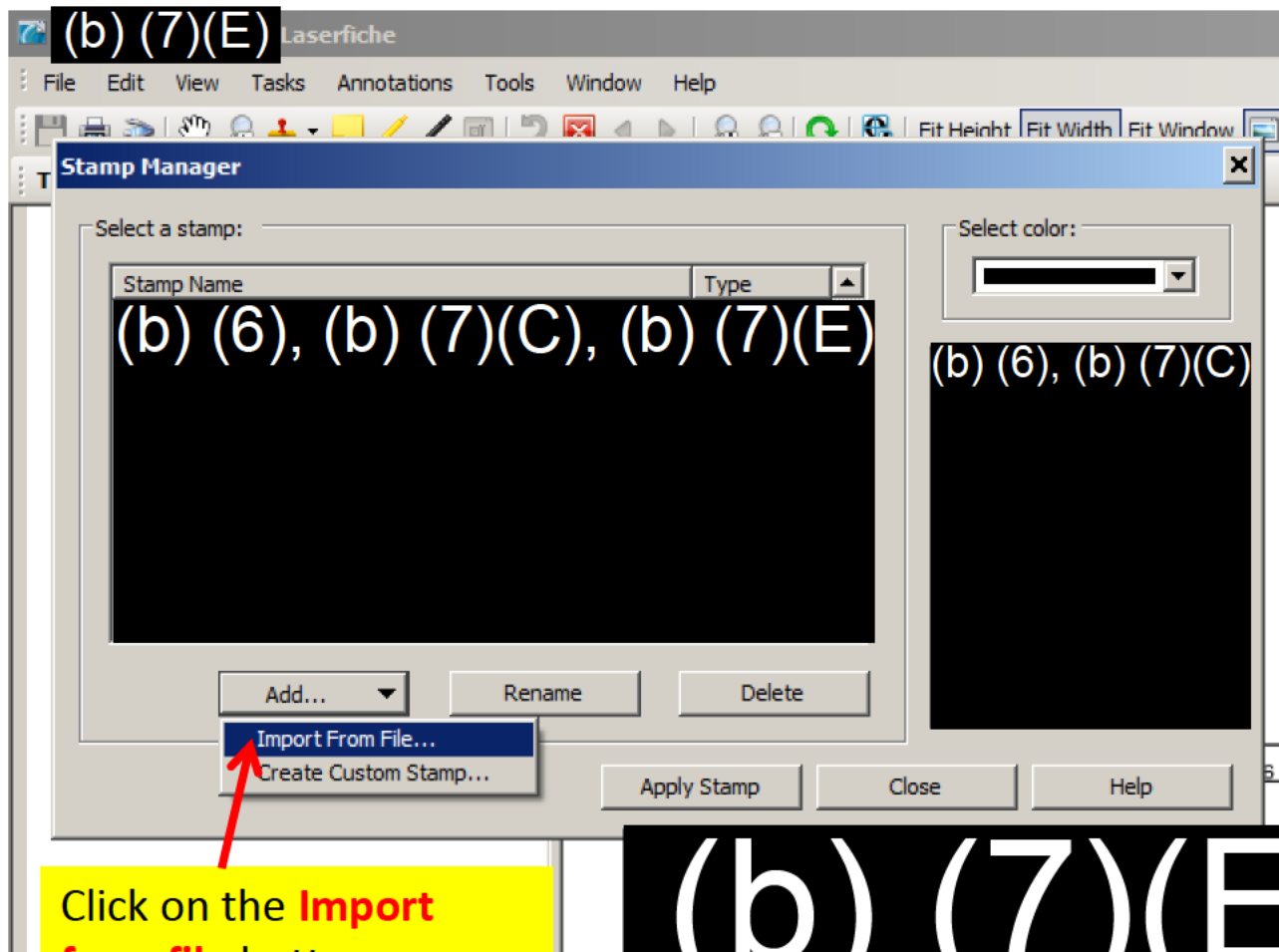
Click **OK**.



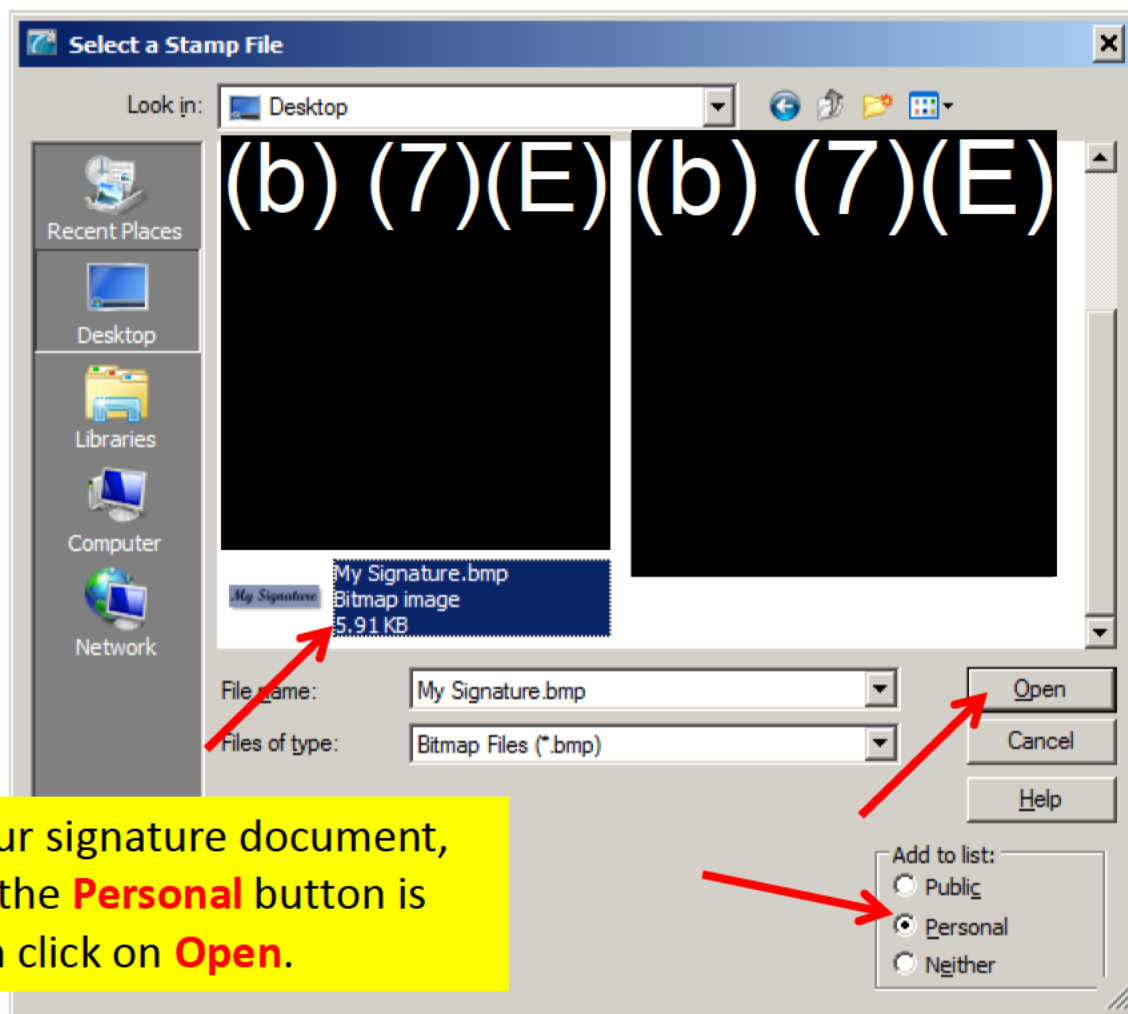
Once you have saved your signature, open up a document within Laserfiche and click on the stamp-pad icon. Click on the **More** line as illustrated.



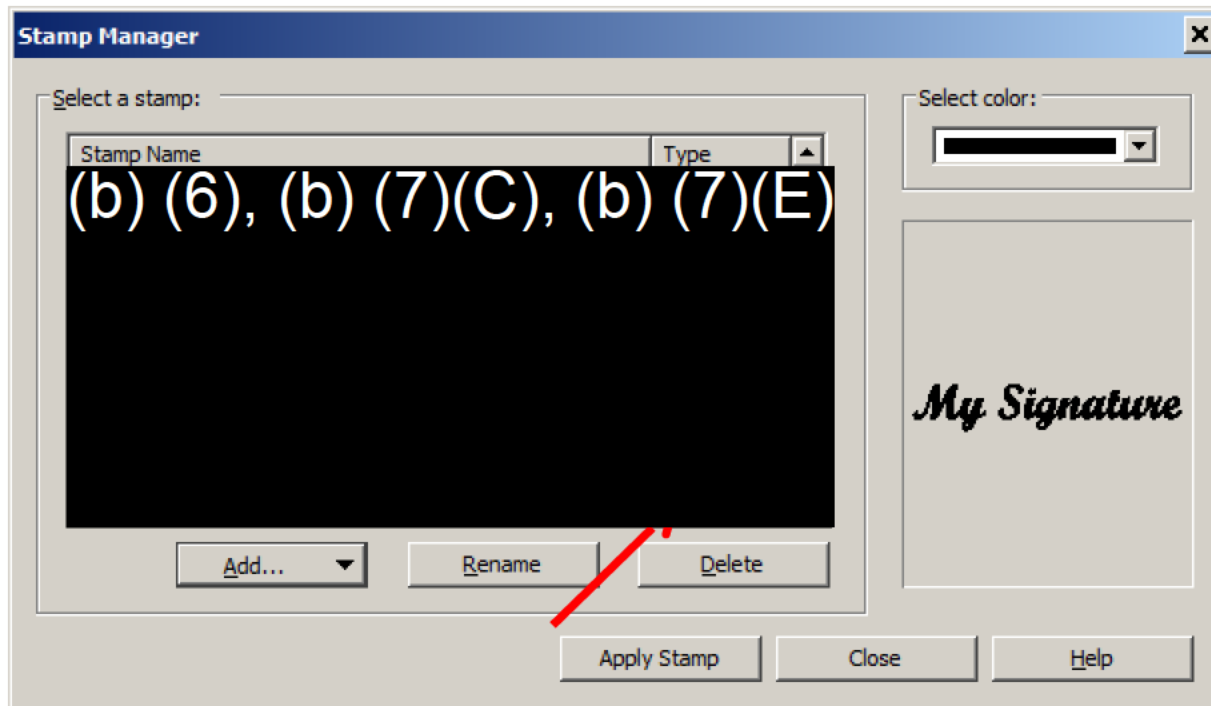
Click on the **Add** button.



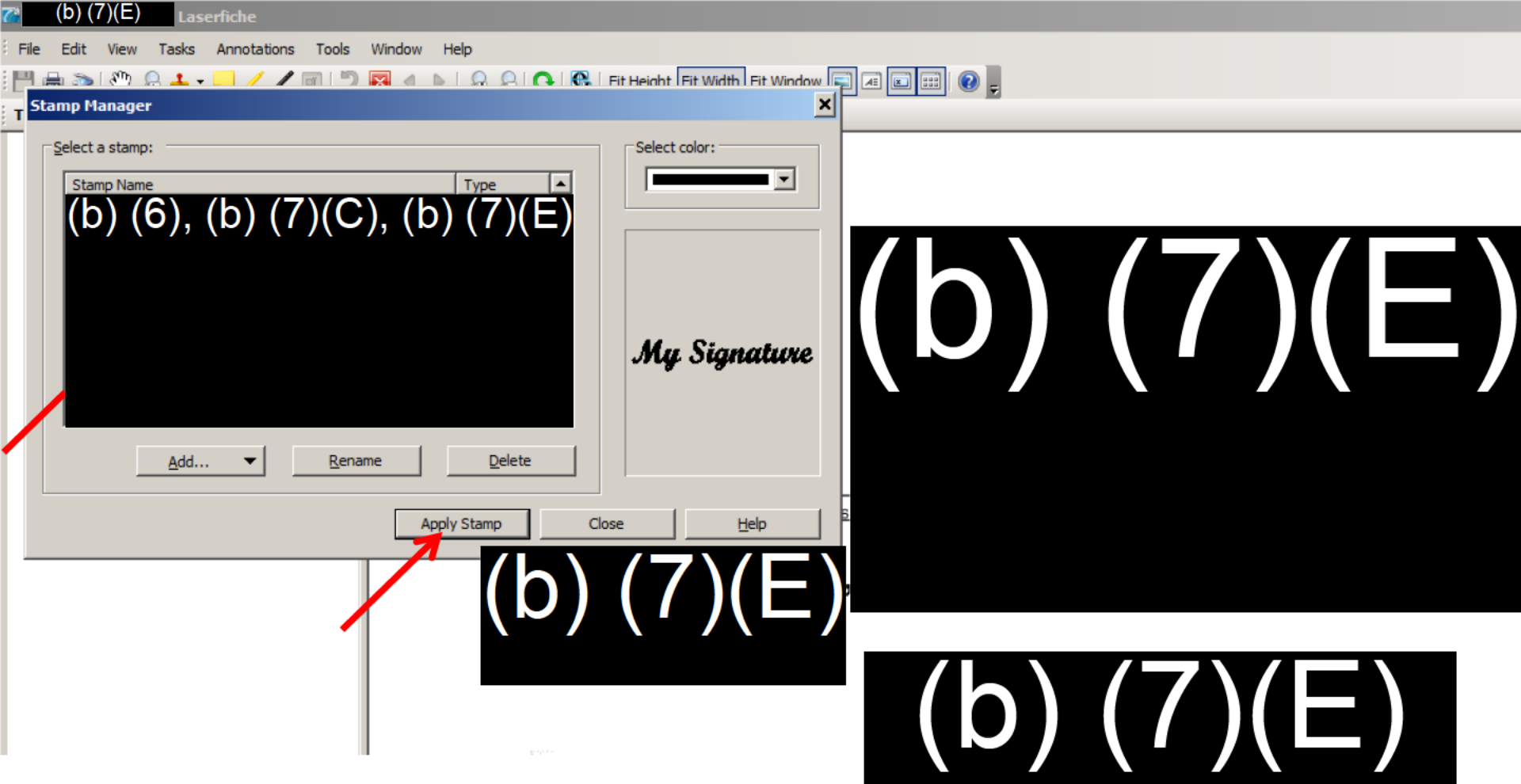
(b) (7)(E)



Highlight your signature document, ensure that the **Personal** button is clicked, then click on **Open**.



Your signature should now appear as one of your options. Ensure Personal type is indicated.



To place your signature on a Laserfiche document, select and click on **Apply Stamp**.

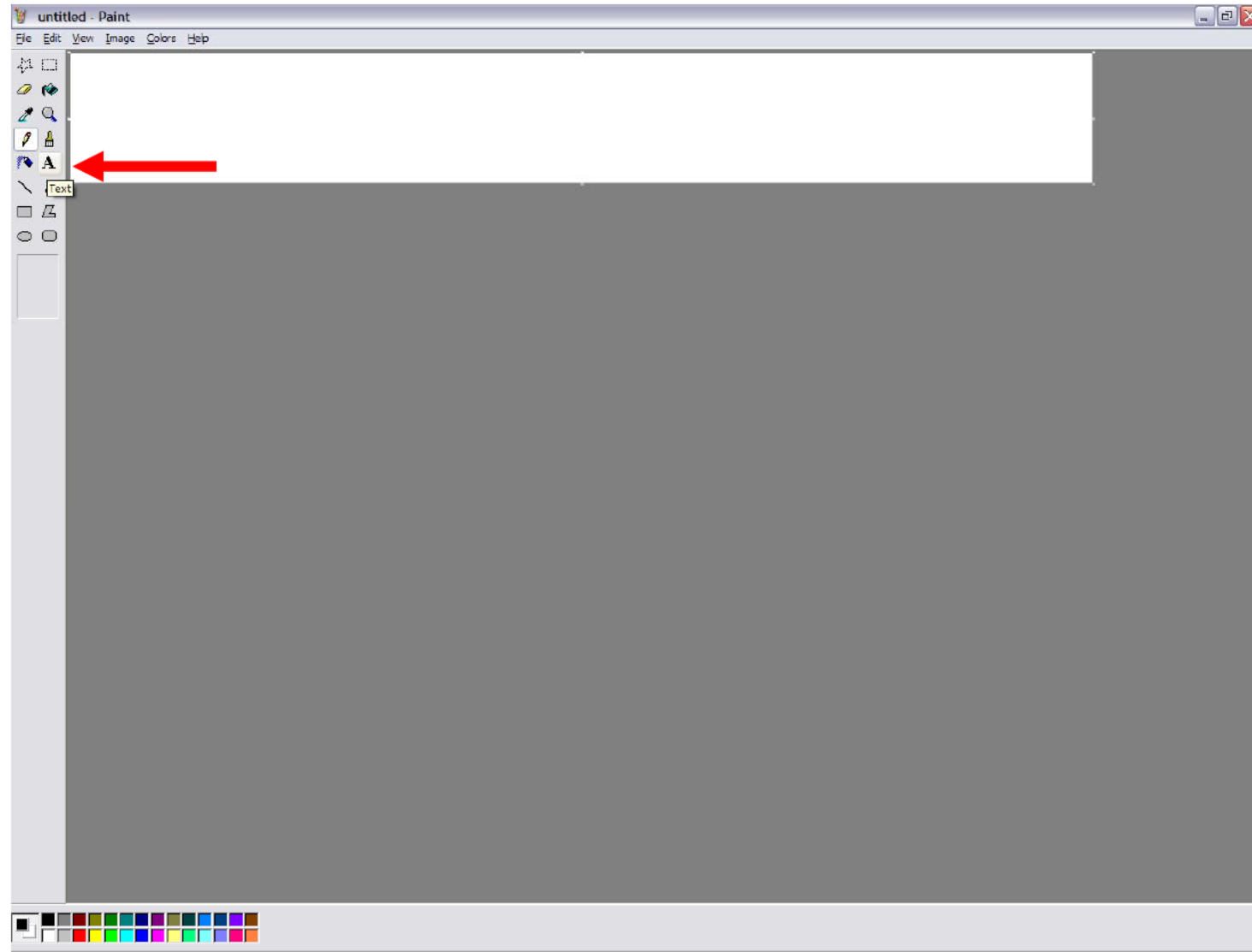
(b) (7)(E)

Stamp may be placed on document and then resized by **dragging the corners**. The signature may also be moved within the document as required.

CREATING A STAMP IN LASERFICHE:

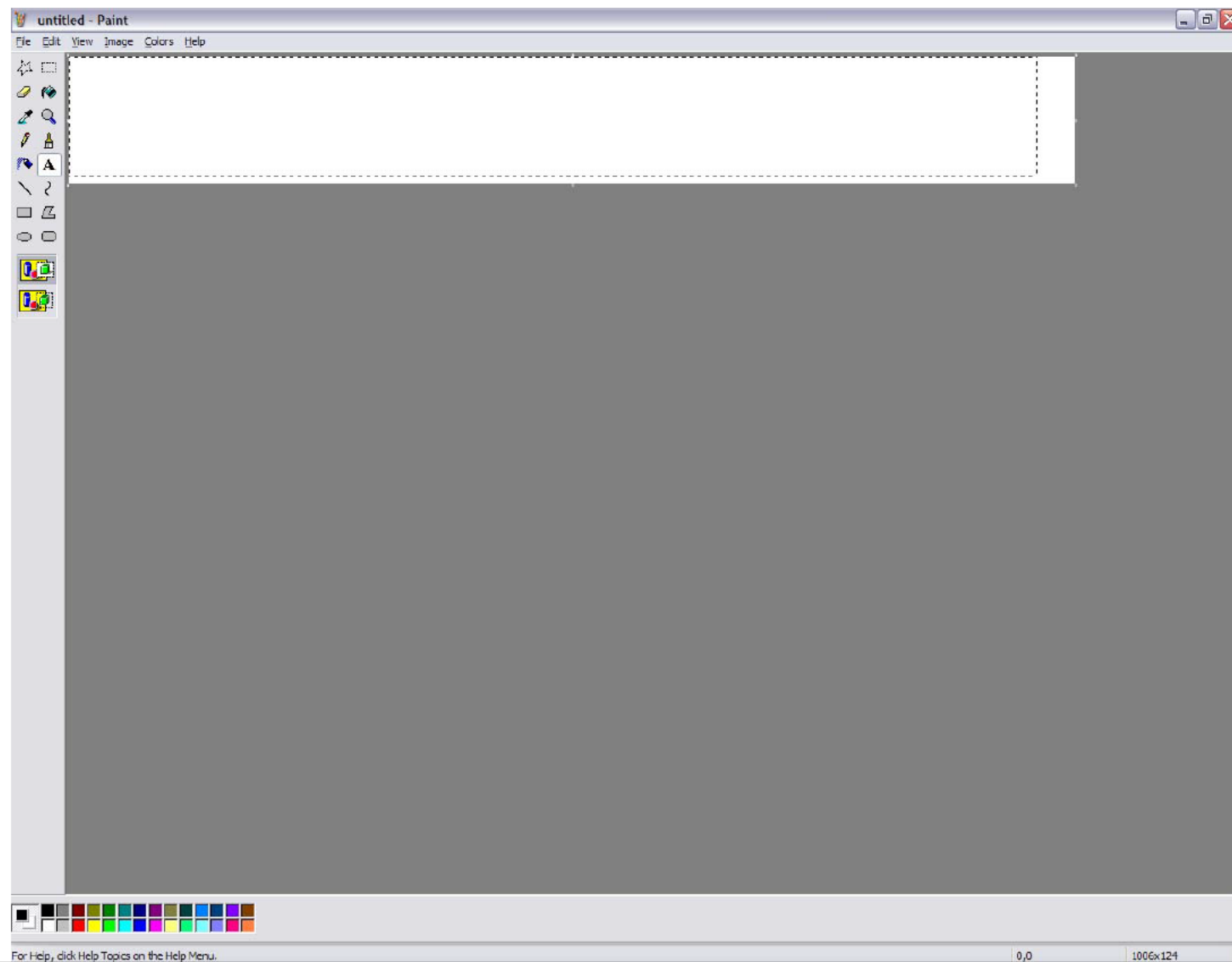
(If you would like to create a stamp from a scan, make sure you scan the item to your (b) (7)(E) as a jpeg image. Open your document in paint and go to step 3.)

1. GO TO "PAINT" FROM YOUR START MENU AND SELECT THE "TEXT" BUTTON.



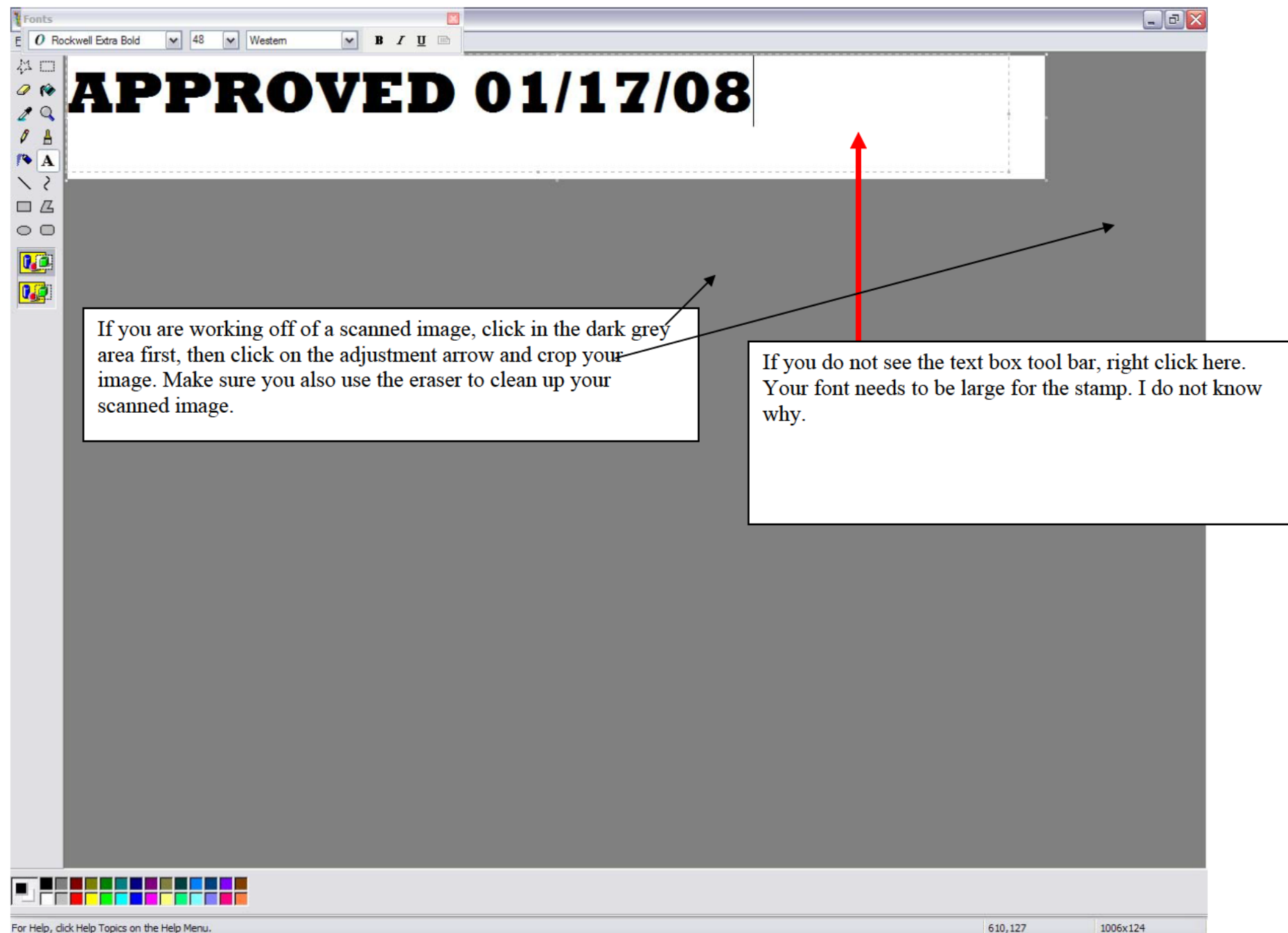
(b) (7)(E)

2. CLICK AND DRAG A BOX FOR YOUR TEXT.



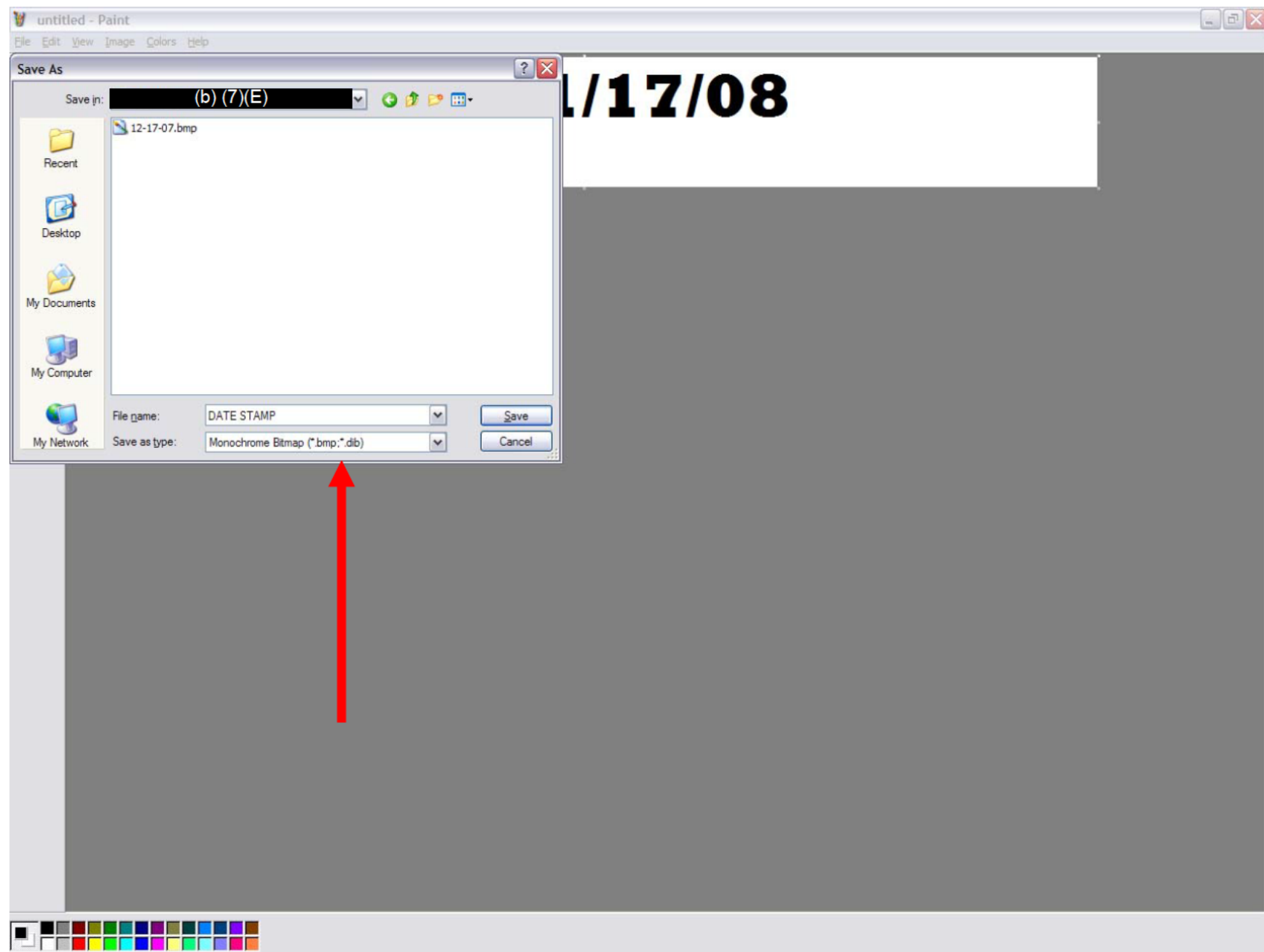
(b) (7)(E)

3. TYPE THE TEXT YOU WANT TO APPEAR ON YOUR STAMP. IF YOU DO NOT SEE THE TEXT TOOL BAR, RIGHT CLICK IN THE TEXT BOX AND SELECT TEXT TOOL BAR.



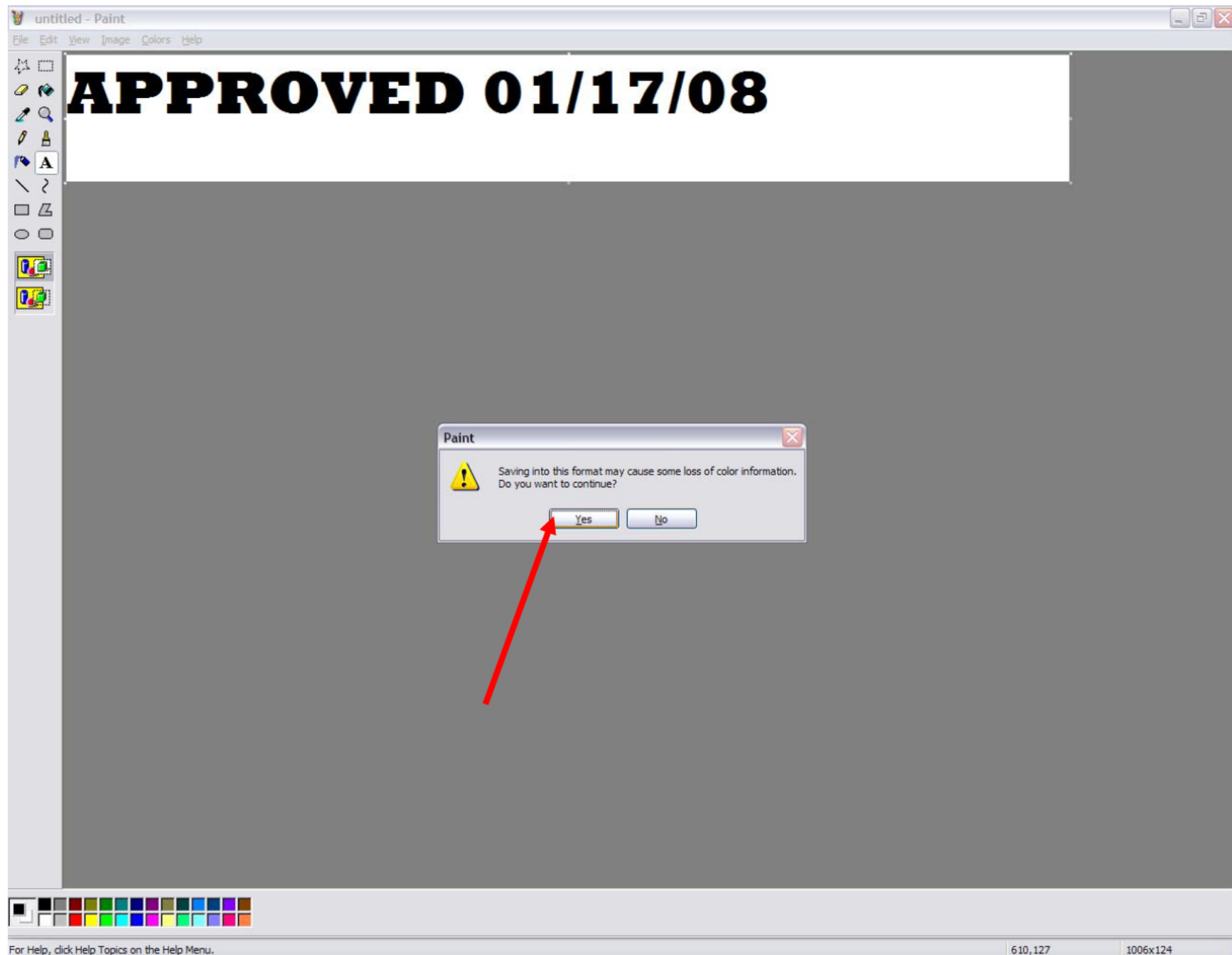
(b) (7)(E)

4. SAVE IT ON YOUR DRIVE AS A MONOCHROME BITMAP. THIS IS THE ONLY WAY IT WILL WORK.



(b) (7)(E)

5. DISREGARD THE WARNING CONCERNING COLOR LOSS. MONOCHROME DOES NOT SAVE IN COLOR AND YOU ARE NOT ATTEMPTING TO SAVE IN COLOR., SO SELECT YES.



(b) (7)(E)

6. OPEN A DOCUMENT IN LASERFICHE AND SELECT THE STAMP ABOVE. USE THE DROP DOWN AND SELECT "MORE".

The screenshot displays the LASERFICHE application window. The title bar shows the file name as (b) (7)(E). The menu bar includes File, Edit, View, Tools, Window, and Help. The toolbar contains icons for file operations, navigation, and editing. The main workspace is a large black redacted area with the text (b) (6), (b) (7)(C), (b) (7)(E) overlaid in white. A red line is visible on the left side of the redacted area. On the right, there is a 'Template' panel with the following fields:

- Template: (b) (7)(E)
- Type of Document: [Dropdown menu]
- First Name: [Text field]
- Last Name: [Text field]
- Date: [Text field with slashes]
- Month: [Dropdown menu]
- Injury: [Text field]
- No: [Dropdown menu]
- Sex: [Text field]

Below the Template panel is a 'Thumbnails' panel showing a single thumbnail of the document, which is also redacted with the text (b) (6), (b) (7)(C), (b) (7)(E) overlaid. At the bottom of the window, there is a large black redacted area with the text (b) (7)(E) overlaid in white.

7. SELECT ADD.

(b) (7)(E)

(b) (6), (b) (7)(C), (b) (7)(E)

Template

Template

Type of Document

First Name

Last Name

Date

Month

Injury

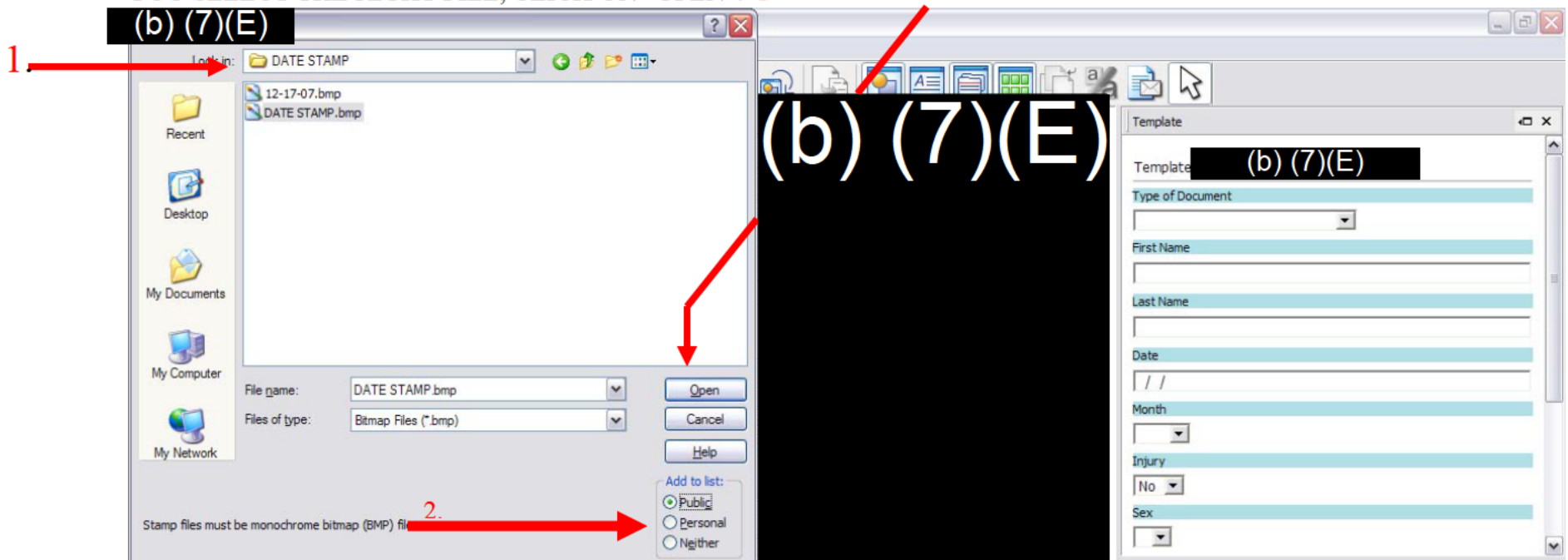
Sex

Thumbnails

(b) (6), (b) (7)(C), (b) (7)(E)

(b) (7)(E)

8. FIND THE FILE YOU WANT TO ADD AS A STAMP. MAKE SURE YOU SELECT PRIVATE OR PERSONAL. ONCE YOU SELECT THE RIGHT FILE, CLICK ON "OPEN". 3

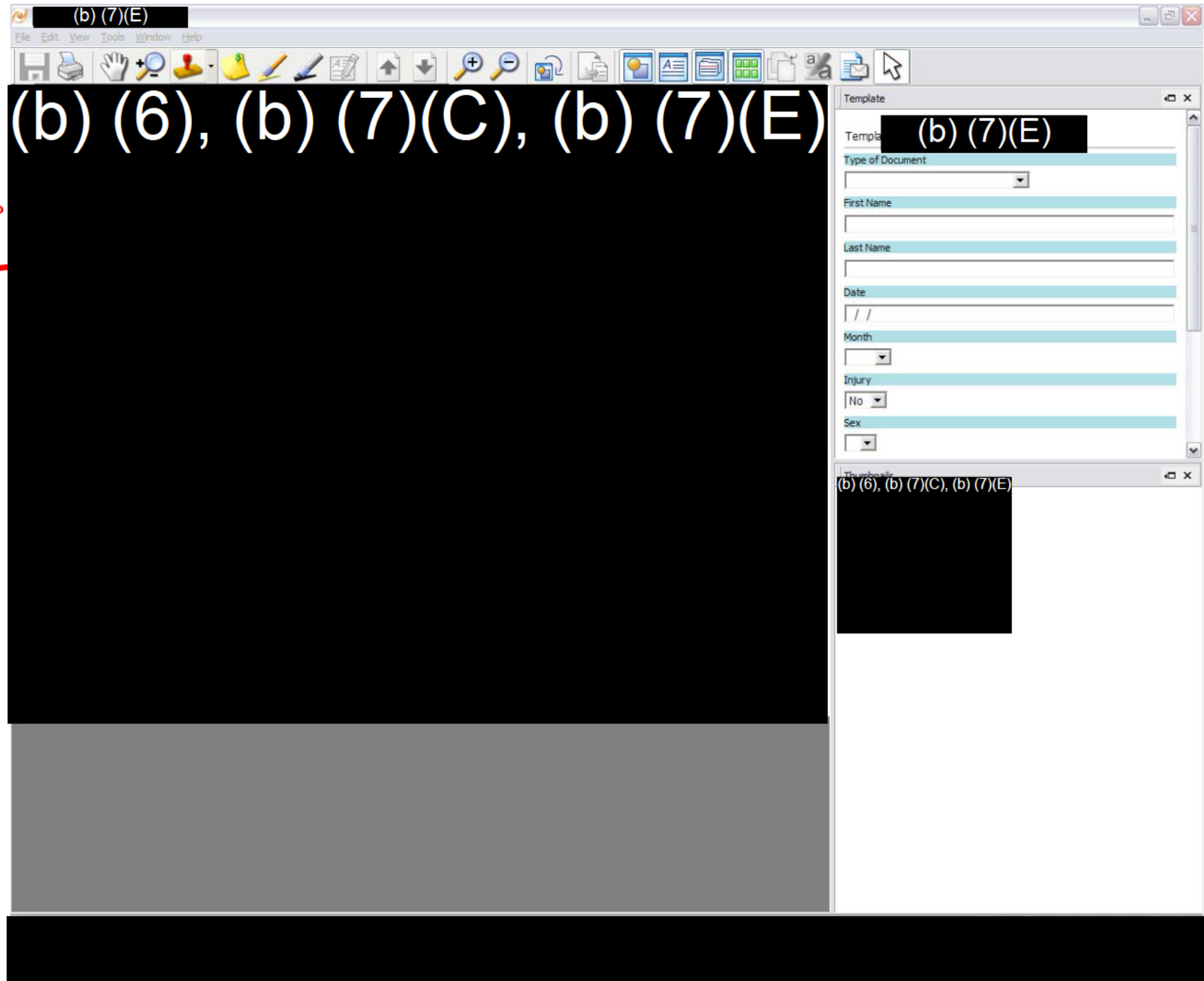


(b) (6), (b) (7)(C), (b) (7)(E)

(b) (6), (b) (7)(C), (b) (7)(E)

(b) (7)(E)

9 . THE STAMP IS NOW IN LF. CHANGE THE COLOR IF YOU WANT. TEST IT OUT. IF THE FONT IS TOO SMALL, GO BACK TO PAINT OPEN YOUR FILE AND INCREASE THE FONT SIZE, SAVE IT, DELETE THE STAMP FROM LF AND ADD THE CORRECTED ONE BACK IN.





**U.S. Department of Homeland Security
Customs and Border Protection
Rio Grande Valley Sector**

Records and Document Management Solution

Standard Operating Principles and Procedures

Reference of Authority

Release 1.1

Original Date: Feb. 28th, 2008

Active Date:



Produced by:

(b) (6), (b) (7)(C), (b) (7)(E)



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Table of Contents

1.....	Introduction	4
2.....	Governing Guidelines and Mandates	4
2.1	Contact Information.....	4
2.2	Technical Support Information	4
2.3	Current Software Version	4
2.4	Training & Access	5
2.5	Security and Passwords.....	5
2.6	Security Statement.....	5
2.7	Policy Statement.....	6
3.....	Master File Plan	6
4.....	Document Approval/Change History Record	6
5.....	Station Processing	6
5.1	Acronyms/Terms and Definitions	6
5.2	Terms and Definitions	7
6	Purpose	10
7	Organizational Units Affected	10
8	Roles and Responsibilities / Authorities	11
9	Process Flow Chart	11
10.....	Procedures / Instructions	11
10.1	Document Preparation	11
10.1.1	Creating Documents	9
10.1.2	Folder Level Access	12
	Attachment A – Forms	18
	Laserfiche Training Form LTF-1.08.1	19
	Laserfiche Access Form LAF-2.08.3.....	19
	Laserfiche Access Security Modification Request Form LSM-2.08.1	19
	Laserfiche File Restoration Form LFR-3.08.2	19
	Laserfiche Workflow Implementation Form LWI-1.08.1	19

Chart & Diagram Contents

Figure 1 - Station Processing in Laserfiche	11
---	----



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Policy Statement

The Rio Grande Valley Sector (RGV) is committed to developing, implementing, and maintaining effective programs and procedures to provide the best value products and services to our employees.

RGV is dedicated to preventing pollution, safeguarding our employees, contractors, visitors, facilities, and the environment at all station locations, by complying with applicable legislation, regulations, and other requirements.

RGV accomplishes this through the attainment of defined goals and by utilizing measurable objectives and targets designed to promote continual improvement.

The following set of business process guidelines are mandatory and must be followed at all times with respect to the overall usage and functionality of the Laserfiche system. Users of the Laserfiche system will adhere to these business processes when working within the system. Modifications and business process enhancements are subject to program changes in effect with this document only pursuant to the active date posted on the cover of this document.

Approved by Sector Chief:  Date: May 8, 2009

Ronald D. Vitiello
Chief Patrol Agent

Notice: The RGV Record and Document Management Standard Operating Principles & Procedures (SOPP) are intended to serve as a practical guide to governing our internal policies and procedures and are not intended to cover all topics or circumstances with respect to records management. These policies and procedures apply to employees of RGV unless otherwise expressly noted. RGV reserves the right to respond to specific situations in whatever manner management reasonably believes best suits the needs of the sector and the employee(s) involved. In the event of a conflict governing these policies direction and actions will be forthcoming from the sector chief prior to implementation.

Nothing in these policies and procedures are intended to create an express or implied contract of employment. RGV will make every effort to communicate changes or modifications to these policies and procedures in an expeditious manner. However, RGV reserves the right to change, modify or waive any or all requested changes contained herein, at any time, based on changes in legal requirements, business conditions, business operations or other relevant circumstances.

2008 – Records & Document Management Goals

The following outlines the overall project plan and programs forthcoming to the overall Records and Document Management System:

Estimated Arrival Date	Module
mm/dd/yyyy	DoD 5015.2 Records Management
mm/dd/yyyy	Digital Signature
mm/dd/yyyy	Workflow & Business Process Management



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mm/dd/yyyy	Forms Processing & Forms Integration
------------	--------------------------------------

1 Introduction

The following document outlines the overall Standard Operation Principles and Procedures (SOPP) governing the use of the Rio Grande Sector Valley Records and Document Management System, herein called Laserfiche.

2 Governing Guidelines and Mandates

A. Covering the creation of and access to information and records:

- i. Federal Records Act (FRA) and National Archives and Record Administration (NARA) regulations
- ii. Section 515 -Treasury and General Government Appropriations Act for Fiscal Year 2001
- iii. E-Government Initiative (E-Gov) and Government Paper Elimination Act (GPEA)
- iv. Freedom of Information Act (FOIA) and E-FOIA amendments
- v. Federal Advisory Committee Act (FACA)

B. Covering the protection and security of information:

- i. Privacy Act and Electronic Communications Privacy Act
- ii. Computer Security Act
- iii. Federal Information Security Management Act

C. Management of information and efficiency in its creation, collection, and use:

- I. Paperwork Reduction Act (PRA) and Government Paper Elimination Act
- II. Clinger-Cohen Act
- III. Government Performance and Results Act
- IV. OMB Circular A-130 / Federal Information Management

D. For maintaining recorded information of enduring interest:

- i. Federal Records Act
- ii. National Archives and Record Administration regulations
- iii. Federal Advisory Committee Act

2.1 Contact Information

For questions related to this document, its content or business processes please contact:

(b) (6), (b) (7)(C)	CPA Staff Assistant	(b) (6), (b) (7)(C)	(b) (6), (b) (7)(C)
	ACPA Staff Assistant		

2.2 Technical Support Information

For technical support related questions with respect to the Laserfiche system please contact (b) (6), (b) (7)(C)

(b) (6), (b) (7)(C) at
(b) (6), (b) (7)(C)

2.3 Current Software Version

(b) (7)(E)



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2.4 Training & Access

Access to the Laserfiche system is provided after users have completed general training of the system. This can be completed by filing out the following request [form](#).

Access to the Laserfiche system will require submission of the following [form](#).

2.5 Security and Passwords

All users of the Laserfiche system will be provided a temporary password that must be changed during the first log in. Sharing passwords or other user information is strictly prohibited and punishable up to and including termination.

2.6 Security Statement

For site security purposes and to ensure that this service remains available to all users, this government computer system employs commercial software programs to monitor network traffic to identify unauthorized attempts to upload or change information, or otherwise cause damage. Except for authorized law enforcement investigations, no other attempts are made to identify individual users or their usage habits. Raw data logs are used for no other purposes and are scheduled for regular destruction in accordance with National Archives and Records Administration guidelines.

Unauthorized attempts to upload information or change information on this service are strictly prohibited and may be punishable under the Computer Fraud and Abuse Act of 1986 and the National Information Infrastructure Protection Act.

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Department of Homeland Security links to many websites created and maintained by other public and/or private organizations. Department of Homeland Security provides these links as a service to our users. When users link to an outside website, they are leaving the Department of Homeland Security site and are subject to the privacy and security policies of the owners/sponsors of the outside website(s). Click here to review the Department of Homeland Security Linking Policy.

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The Department of Homeland Security is not responsible for transmissions users receive from linked websites.

The Department of Homeland Security does not guarantee that outside websites comply with the requirements of Section 508 (Accessibility Requirements) of the Rehabilitation Act.

2.7 Policy Statement

3 Master File Plan

The following outlines the overall RGV file plan as directed by the Department of Homeland. Please see attachment C for a complete list of all series codes used at RGV Sector.

4 Document Approval/Change History Record

Issue Date	Approvals		Change Description
mm/dd/yyyy	REQUIRED NAME	REQUIRED NAME	Added station digitization procedure and policy for Laserfiche input and records management.
	(b) (6), (b) (7)(C)	(b) (6), (b) (7)(C)	

5 Station Processing

Each station will prepare, digitize and process all official Border Patrol documents generated by their location.

5.1 Acronyms/Terms and Definitions





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5.2 Acronyms







(A)	Acting
ACPA	Assistant Chief Patrol Agent
AMO	Air and Marine Operations
APAIC	Assistant Patrol Agent in Charge
BPA	Border Patrol Agent
CBP	Customs & Border Protection
Chief	Chief U.S. Border Patrol
CPA	Chief Patrol Agent
DAO	Director Air Operations
DCPA	Deputy Chief Patrol Agent
DHS	Department of Homeland
DRO	Detention and Removal Operations
FOS	Field Operations Supervisor
HRM	Human Resource Management
ICE	Immigration and Customs Enforcement
LAN	Local Area Network
LER	Labor Employee Relations
OBP	Office of Border Patrol
OFO	Office of Field Operations (U.S. Customs)
OIT	Office of Information Technology
PAIC	Patrol Agent in Charge
RDMS	Records & Document Management System
SBPA	Supervisory Border Patrol Agent
SPA	Senior Patrol Agent
WAN	Wide Area Network
RGV	Rio Grande Valley Sector

5.3 Terms and Definitions

	<p>Laserfiche provides the means through which you can access your organization's information. This information is stored and organized according to your organization's procedures and preferences. In addition to allowing you to view content stored in a Laserfiche repository, Laserfiche allows you to add, modify, and delete that content. It provides complete control over what type of information is stored, where that information is stored, how long it is kept, and who can view that information</p>
Client	Laserfiche software that allows users to view a repository.
	<p>You can create a copy of a document. A copy will contain the same pages (including annotations) and field information that were assigned to the original document. However, it will not be automatically assigned version, link and shortcut information.</p>














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Cut 	Copies the specified range of text to the clipboard and deletes it from the document.
Document Relationships	<p>A document relationship describes the interaction between two related documents in terms of a source and a target. The source describes the type of relationship from the point of view of the document from which the relationship was established. The target describes the relationship from the point of view of the document to which a relationship was established. For example, assuming that you have a source called "Supersedes" and a target called "Is superseded by," then the only difference between the following relationships is the perspective:</p> <ul style="list-style-type: none"> • Document 1 Supersedes Document 2 • Document 2 Is superseded by Document 1.
Documents	<p>A document is an entry that is stored in a folder within a Laserfiche repository. This type of entry can contain images, text, and an electronic file. When an electronic file has been associated with a document, it is known as an electronic document. Finally, it can be assigned metadata (i.e. field data, tags, version information, etc.).</p>
Fields 	<p>A field allows supplemental information to be associated with a document or folder. Each field is associated with a template. Only one template can be assigned to a document or folder. Therefore, the available fields for a document or folder depends on the template that was assigned to it.</p>
Groups 	<p>A field allows supplemental information to be associated with a document or folder. Each field is associated with a template. Only one template can be assigned to a document or folder. Therefore, the available fields for a document or folder depends on the template that was assigned to it. The type of information that a field is</p>
Index	<p>The index process stores the location of words in a document or an electronic document in a search index file. A full-text search can look for words or phrases stored in indexed documents.</p>
Link	<p>The Links tab of the Metadata dialog box displays a list of documents to which a specified document has been linked.</p>
Metadata 	<p>A document can consist of images, text, and electronic files. Any additional information (i.e. field data, tags, version information, linked documents, etc.) that can be associated with a document is considered metadata.</p>
Move	
OCR 	<p>OCR can be performed on a document to generate text from images. Text will then be associated with each image page in a processed document. If this text is also indexed, then it will be searchable.</p>
Password 	







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Paste 	The Paste command creates a new copy that will act as a new "original" document.
Paste Shortcut	
Repository 	Data stored in a Laserfiche repository is structured and stored on a computer server which can then be searched and retrieved by the client program.
Sensitive Document	A document which contains sensitive and or confidential information. Sensitive documents must be processed by the appropriate staff and must be tagged once created in Laserfiche.
Shortcut 	A shortcut allows you to open an item from a location other than where it is stored in the repository. Shortcuts are meant to provide quick and convenient access to documents, while maintaining the manner in which your documents have been organized. The shortcut icons will have an arrow in the lower left hand corner.
Snapshot 	The Laserfiche Snapshot utility can generate image and text pages from an electronic document by using the Snapshot virtual printer.
Stamps 	A stamp is a small image file that can be positioned on top of an image page in a Laserfiche document. Stamps do not alter the original image. They are simply another type of annotation. There are three different types of stamps, which are public, personal, and single use. Stamps made PUBLIC will be viewed by all users.
Sticky Note 	Sticky note is a type of annotation that can be used to store comments about an image. The sticky note tool is available from within the document window of the Laserfiche client.
Templates 	A template consist of a set of fields. A single template can be assigned to a document or folder.
Trashcan	
User 	A Laserfiche user account enables the user to authenticate to a Laserfiche repository and, with the appropriate permissions, allows access to content stored in the repository.
Volume 	A volume stores data such as images, text, and electronic files in a hierarchical folder structure. A volume provides the structure through which the contents of each document or electronic document can be organized.
Redaction 	Redaction is a type of annotation that can be used to hide a region on an image or certain text characters from unauthorized users. The redaction tool is available from within the document window of the Laserfiche client.
Scan 	<p>Scanning is the process through which images are created from paper documents. Typically, scanning is performed using a scanner.</p> <p>This term is also used to refer to the process of capturing content using the different types of scan sources that are available from within Laserfiche Quick Fields or Laserfiche Scanning. These other types of scan sources allow you to capture content using a digital camera, directly from a Laserfiche</p>



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	repository, or from a disk drive.
Security Tags 	A security tag prevents Laserfiche users from accessing documents associated with categories for which they do not have permissions. Documents with security tags can only be seen or acted upon by users that have been granted clearance to all of the security tags assigned to the document. Security tag clearance can be granted to Laserfiche users and groups.
Tags	Tags are a type of metadata that contain special handling instructions relating to documents and folders in a Laserfiche repository. There are two types of tags: informational and security.
Vital Records	A vital record is a record that is essential to the operation of your organization. Vital records are subject to periodic review and update.
Workflow	Workflow is the capability to route documents and/or folders within a
Electronic Document 	An electronic document is a Laserfiche document that has been associated with an electronic file. An electronic file is any file that will be opened using an application other than Laserfiche. For example, a Word document stored in Laserfiche can be viewed using Microsoft Word. The icon shown to the left is a symbol that represents a generic electronic document. However, this symbol is not used to identify an electronic document in the folder browser window. By default, the icon for the Windows application associated with an electronic document's electronic file is displayed in the folder browser window.
Search 	The search feature is a powerful tool that can be used to find any document. You simply need to know something about the document that you are looking for. You can then use this information to perform the appropriate type of search.
Edit Text 	The text assigned to a page can be modified at any time. Additionally, you can always assign text to a page, even if it doesn't already have text. Documents that are handwritten will not OCR properly. The edit text function will allow you to store information about the document in the text. Once you re-index, the information will become searchable without altering the actual document.

6 Purpose

The purpose of these instructions is to direct all RGV Sector personnel the proper placing of records into the Laserfiche system and in doing so are in accordance with the approved business process herein.

7 Organizational Units Affected

All employees within Rio Grande Valley Sector will be required to process work within Laserfiche.



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8 Roles and Responsibilities / Authorities

Role	Responsibility / Authority
Lead Administrator	Reviews and approves all new user requests.
Associate Administrator	Creates new users and applies all restrictions to users and folders. Assists with workflows, SOPP updates and training.
Administrator Trustee	Re-sets Passwords at the Station or Department Level
Records Manager	Oversight of all Records for the RGV Sector
Associate Records Manager	Ensures all Official Records are Processed within Regulation. This should be assigned to one User per Station.
Sensitive Document Manager	Processes all documents dealing with sensitive material or Labor Employee Relations.
User	All employee's with Laserfiche Access

9 Process Flow Chart

The following outlines the business process governing station documents within the Laserfiche system.

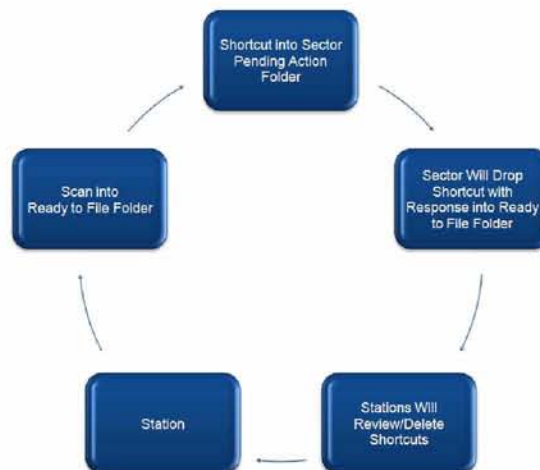


Figure 1 - Station Processing in Laserfiche

10 Procedures / Instructions

The following outlines the overall business procedures and instructions for all RGV Stations and departments with respect to the digitization and management of records via the Laserfiche system.

10.1 Document Preparation

The following outlines the business process for all station locations and departments.



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10.1.1 Creating Documents

Documents will be created on a daily basis in all departments and stations by scanning, Snapshot or forms. Originals will be stored in assigned folders. A Shortcut will be created for processing purposes.

All documents scanned into the Laserfiche system must be prepared prior to scanning by removing all paperclips, staples and any other items that could damage the scanner, hide or appear to alter content within any page of the document.

All scanning will be performed in black and white single or double sided according to the documents, and scanned in at no less than 200 DPI, with the exception of photographs and documents that rely on color to convey information.

Rights will only be granted to scan and save into one folder per employee unless an exception has been made by the Lead Administrator.

10.1.2 Processing Documents

All documents scanned into Laserfiche addressed to the Chief Patrol Agent will be placed in the appropriate station or department outgoing folder. A shortcut will be created and pasted to the appropriate ACPA.

Some documents need to be part of our records; however a shortcut to the ACPA's should not be created. The exception to this policy is as follows (see attachment B for further guidance):

(b) (7)(E)

Human Resource Related documents must be sent through the Human Resource Management department before review by your assigned ACPA. Create a shortcut and place it in the **(b) (7)(E)** **(b) (7)(E)** Once the documents have been reviewed, HRM will send to the appropriate staff. (see attachment B for further guidance) Some examples of HRM documents include but are not limited to:

(b) (7)(E)



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(b) (7)(E)

All documentation containing disciplinary matters must be sent via shortcut to your assigned ACPA only unless instructed by the Chief's staff otherwise. No exceptions!

Documents that have not been processed in the prescribed manor will be returned to the **(b) (7)(E)** folder for correction at the discretion of the ACPA. Each returned document will have stamps or sticky notes with instructions concerning required corrections. If additional documentation is required, scan or Snapshot the new items, attach to your original item, and return the shortcut from your incoming folder to the appropriate official. **DO NOT CREATE MULTIPLE SHORTCUTS!** In the event a document must be copied to additional staff, e-mail a copy or request the document to be forwarded to the appropriate official. **REMEMBER:** when you send original documents to the trashcan, you cause the document to "disable" and access to the shortcut will be denied. It is better to keep your original document and make corrections so you work will continue to process with your shortcut in tact.

OPTICAL CHARACTER RECOGNITION AND TEXT

The OCR function must be enabled when documents are brought into Laserfiche by scanning ([ADD LINK](#)) or Snapshot ([ADD LINK](#)). In the event a document is in the system and still requires OCR, follow these instructions ([ADD LINK](#)).

Documents that contain handwritten information must be edited in the "TEXT" section. Laserfiche OCR cannot read un-typed information with accuracy. You will need to read the document and determine what key words should be included in a search. Add those words under your text option. For instructions on this function, please refer to the Laserfiche User Guide; page 221 Assigning Text to a Page. ([ADD LINK](#))

RGV SECTOR LASERFICHE SECURITY

All documents scanned into Laserfiche must be given the appropriate security and links. Many times a document may seem average and routine, but a quick check will reveal the need for additional safeguarding.

Documents that contain sensitive information, including Labor Employee Relations documents, must be processed by the Sensitive Records Manager. It is the Sensitive Records Managers responsibility to ensure that all documents (regardless of the title listed in the subject line) are secured within the guidance set forth by the Rio Grande Valley Sector.

Security Tags are a means of restricting a documents access. Each station has been issued a security tags that will allow the proper level of restriction based on the recommendation of the Patrol Agent in Charge of each station. When tags are applied appropriately, sensitive documents will be inaccessible to anyone outside of the authorized tag users. Tags can be found on the Metadata screen. Only the tags you are authorized to view will be available for selection. The description next to each tag lists the tag members by group. For more information see ([ADD LINK](#)).



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Documents including but not limited to that require tags:



RGV SECTOR LASERFICHE LINKS

Links allow users to establish the relationship between two documents. Anytime you need to have quick reference to more than one document that you wish to keep separate, a link should be used. Links should be established between the initial reports to follow up reports when the user assumes the intended recipients will need to view the main document and supporting information. For more information see [\(ADD LINK\)](#)

10.1.3 Folder Level Access

Laserfiche users will be assigned a personnel folder. Documents should be placed in the folder via Snapshot or scanning. Once the document is ready to process, the following procedures will be followed unless otherwise directed:

1. Stations will move the original to the station outgoing folder. Departments will move the original to the department incoming folder.
2. A shortcut will be created and placed in the appropriate processing location.

Access will be granted at the discretion of the Chief Patrol Agent at a level associated with requestor's job requirements and level of background clearance.



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10.1.3.1 Document Naming Convention

All documents scanned into Laserfiche must be given an appropriate title. Many times the document subject line does not give enough information to distinguish one incident from another. In some cases the title does not reflect a complete account of what is being reported.

It is the Associate Records Manager's responsibility to ensure all general documents (regardless of the title listed in the subject line) are named according to the guidance set forth by the Rio Grande Valley Sector. The Sensitive Records management will be responsible for all restricted documents. For additional guidance, please contact Lead Administrator Marissa Villarreal at (956) 289-4824. All documents must include the following in the order shown:

A. Three Digit Sector Code:
RGV

B. Three Digit Station or Department Code:

(b) (7)(E)

Department Codes (If Applicable):

AFO	Asset Forfeiture
AMO	Marine Operations
BIC	Border Intelligence Center
BGT	Budget
BORS	Borstar
CIRT	Critical Incident Response Team
EEO	Equal Employment Opportunity
FIR	Firearms
GAR	Garage
HGD	Honor Guard
HRM	Human Resource Department
IA	Internal Affairs
INT	Intelligence Department
K9	Canine
LER	Labor Employee Relations
LGL	Counsel
MTS	Maintenance
OIM	Office of Incident Management



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OIT	Office of Information Technology
OWCP	Office of Workers Compensation Program
PAO	Public Affairs Office
PRS	Peer Support
PRO	Prosecutions
RAD	Radio
RCT	Recruitment
SRT	Special Response Team
STAFF	CPA, DCPA, ACPA
SUP	Supply
TRN	Training

C. Four Digit Year:

2008
2009
2010

E. Document Title:

(b) (7)(E)



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(b) (7)(E)

In cases where you need to distinguish similar documents, the abbreviated month may be added along with the date. This may be used in cases where something is requested more than once i.e. (b) (7)(E) (b) (7)(E) etc.

10.1.3.2 Template Fields

All documents entered into Laserfiche must contain a template. Documents addressed to the Chief Patrol Agent must include the (b) (7)(E) Template. Other templates must be used for the following:

(b) (7)(E)

(b) (7)(E)

Attachment A – Forms

The following provides access to all Laserfiche forms for management and usage of the overall system. The (b) (7)(E) is being applied pursuant to (b) (7)(E) No user request for action can be performed within the Laserfiche system without a completed and approved form.

Definition of form versions:

Example (b) (7)(E)

(b) (7)(E)



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"5" References the most current version of the form

Laserfiche Training Form (b) (7)(E)

Please fill out the following [form](#). There is a submit button on the bottom which will route the form to the appropriate user for processing.

Laserfiche Access Form (b) (7)(E)

Please fill out the following form. There is a submit button on the bottom which will route the form to the appropriate user for processing.

Laserfiche Access Security Modification Request Form (b) (7)(E)

Please fill out the following form. There is a submit button on the bottom which will route the form to the appropriate user for processing.

Laserfiche File Restoration Form (b) (7)(E)

Please fill out the following form. There is a submit button on the bottom which will route the form to the appropriate user for processing.

Laserfiche Workflow Implementation Form (b) (7)(E)

This form is not yet available

Attachment B Workflows

(b) (7)(E)

Attachment C File Plan

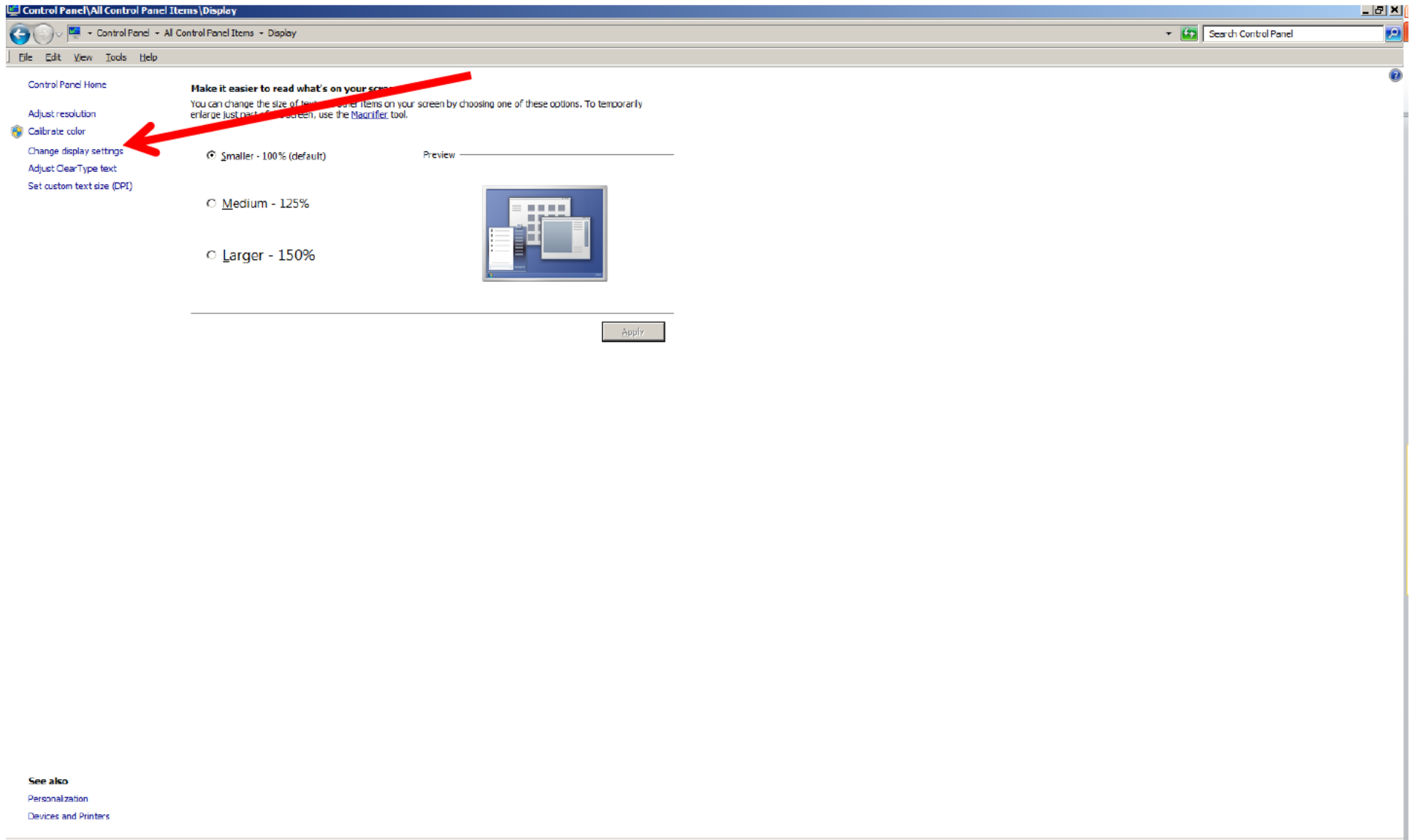
RGV File Plan (Last Update 08/2006)

Signatures not printing on PCTWs has to do with the ***Hardware acceleration*** settings on your particular workstation. Please have OIT change your settings using the following procedures.

(b) (6), (b) (7)(C), (b) (7)(E)



(b) (7)(E)



Change the appearance of your displays



Display: 1. ViewSonic VG2030wm SERIES

Resolution: 1680 x 1050 (recommended)

Orientation: Landscape

Multiple displays: Extend these displays

☐ Make this my main display

[Advanced settings](#)

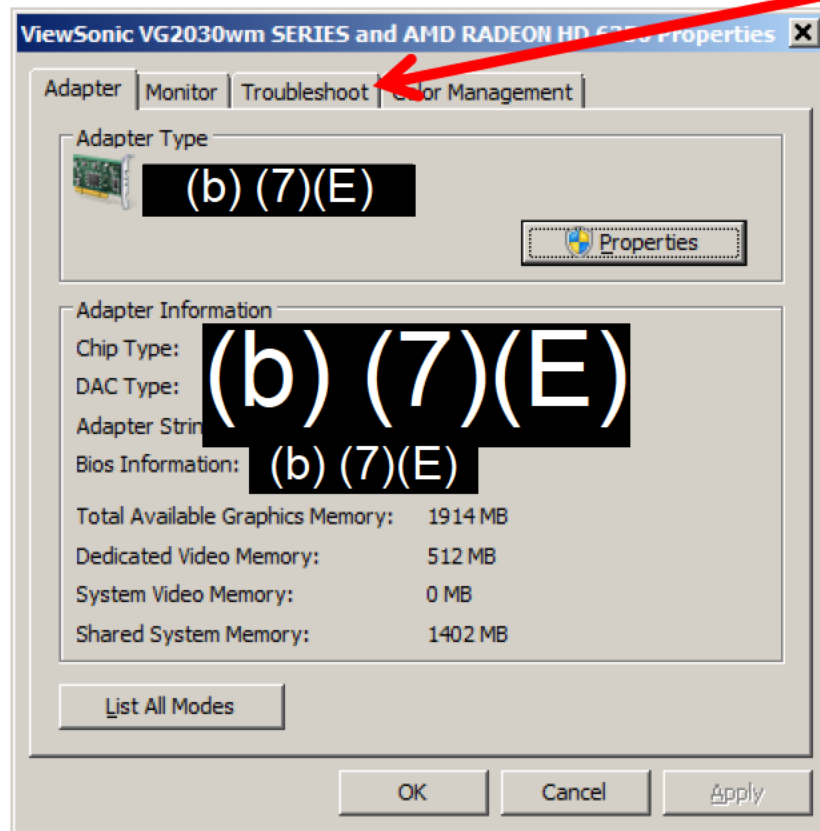
Make text and other items larger or smaller

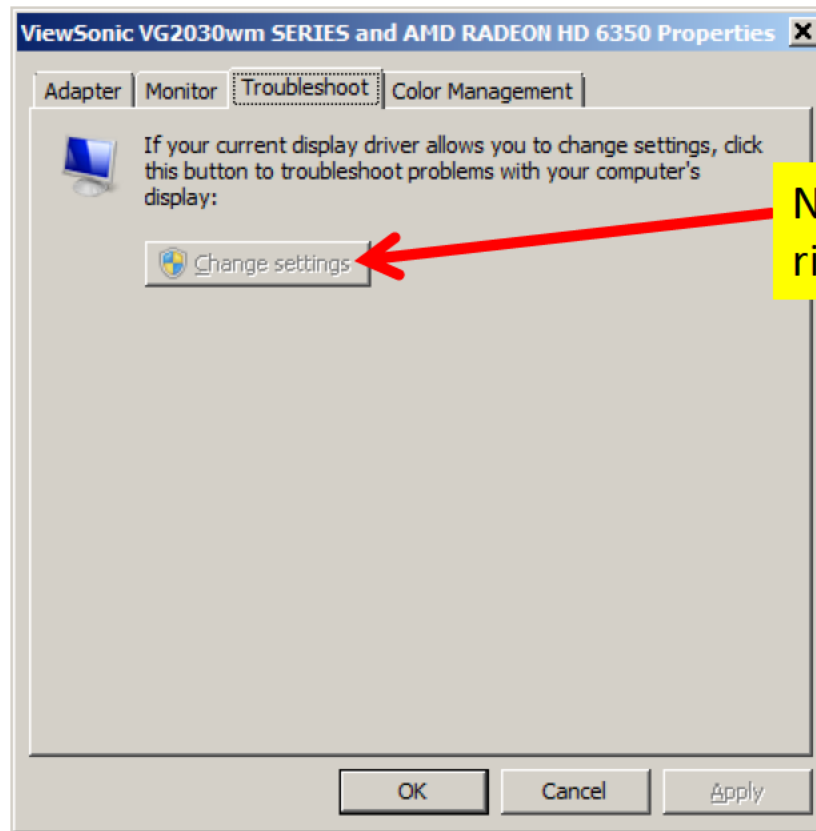
What display settings should I choose?

OK

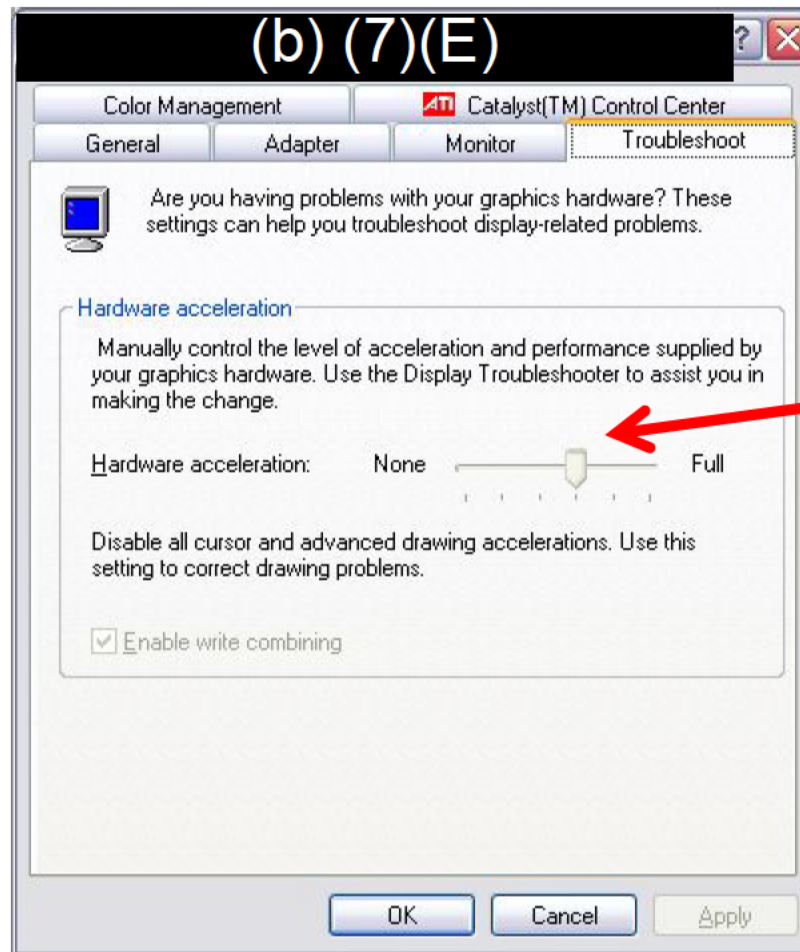
Cancel

Apply

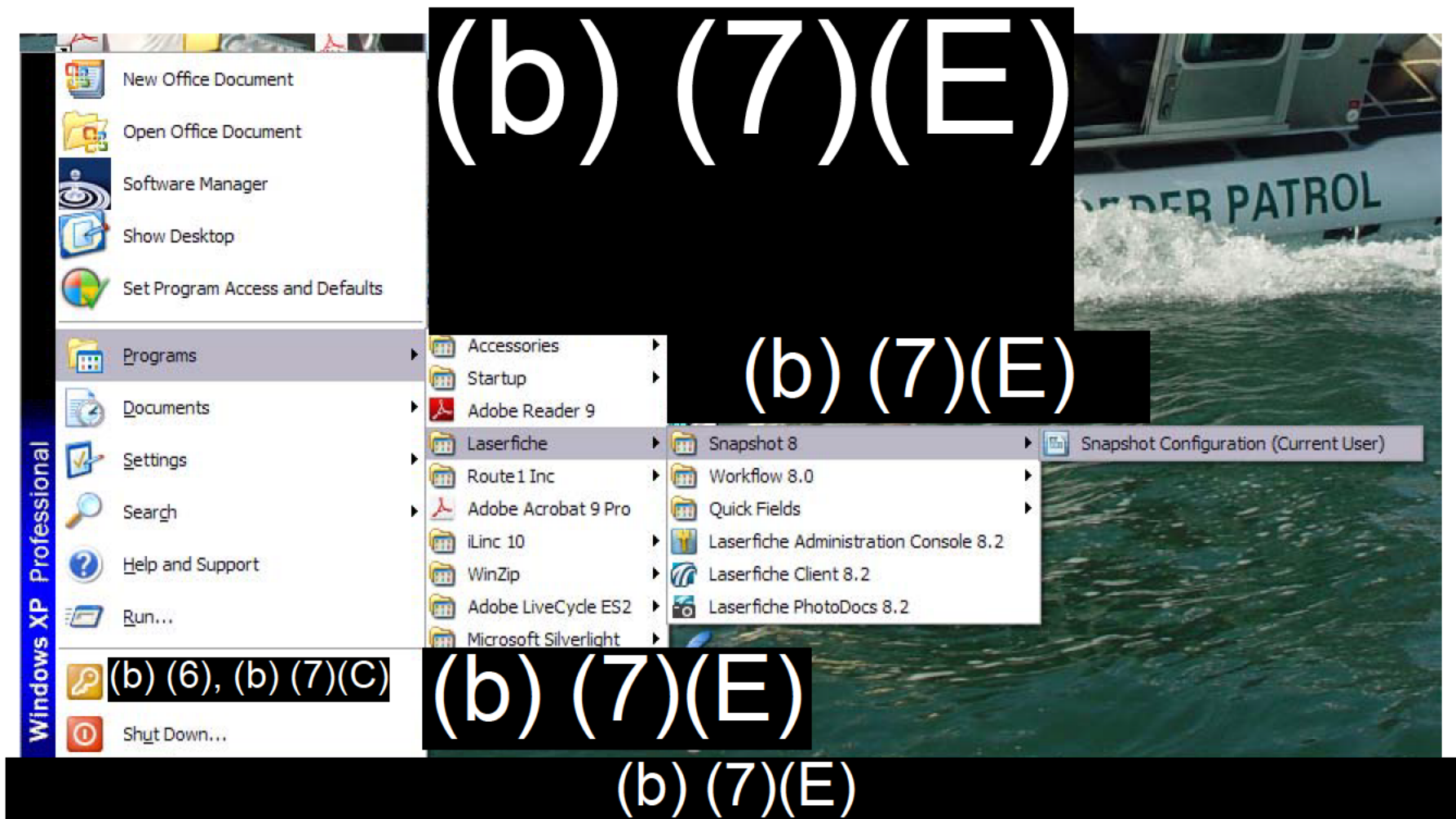




Need OIT administrator rights to make changes.



Solution to signatures not printing on PCTWs has to do with the **Hardware acceleration** settings. Try reducing the settings and test for signatures on your printouts.



To configure/re-configure your Snapshot 8, please click on the Start button at the bottom left of your monitor. Click on Programs, Laserfiche, Snapshot 8, Snapshot Configuration (Current User).

Repository Login [X]

Repository

Server:

(b) (7)(E)

Repository selection:

(b) (7)(E)

Authentication

Log into the repository using:

☒ Windows authentication

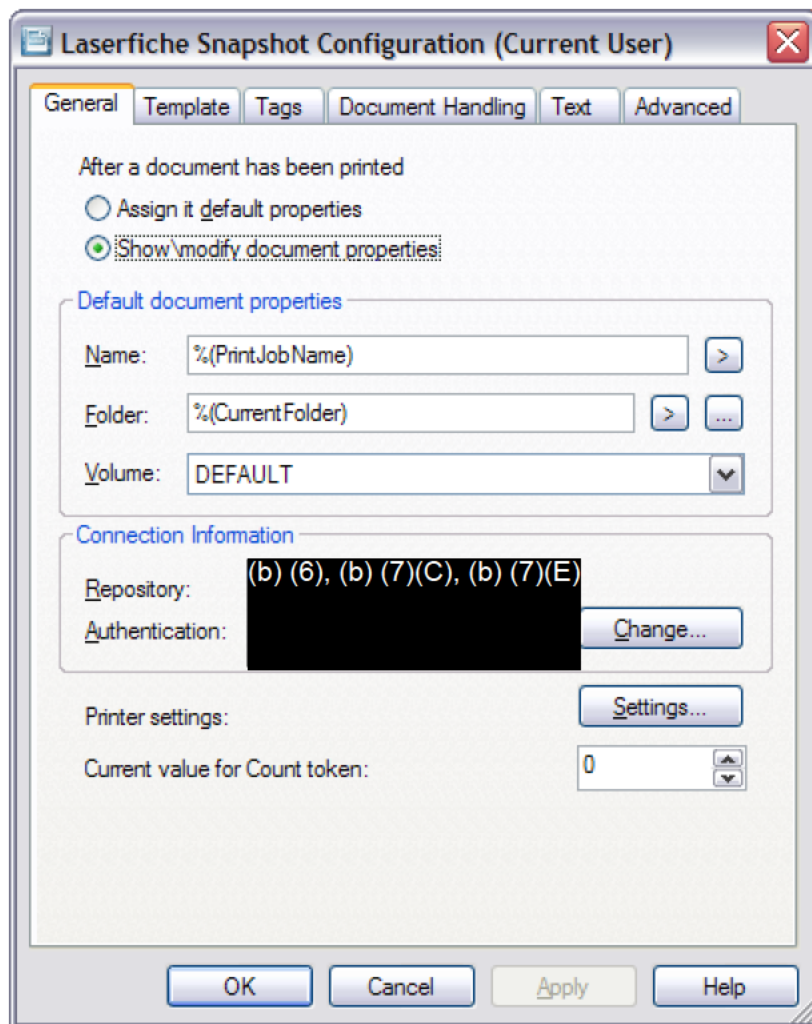
☐ This user account

User name:

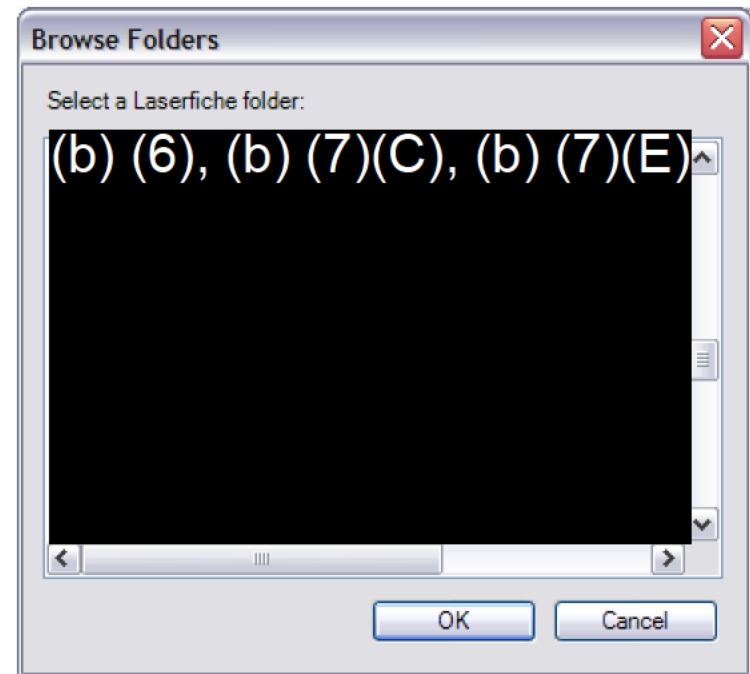
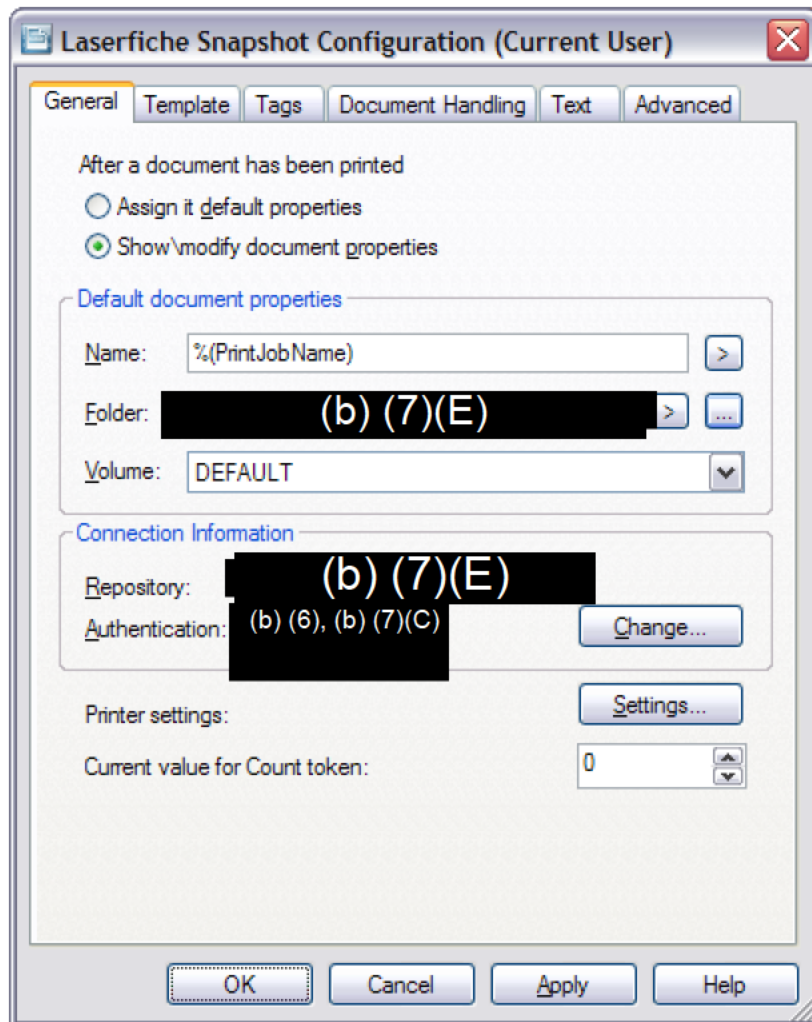
Password:

OK Cancel

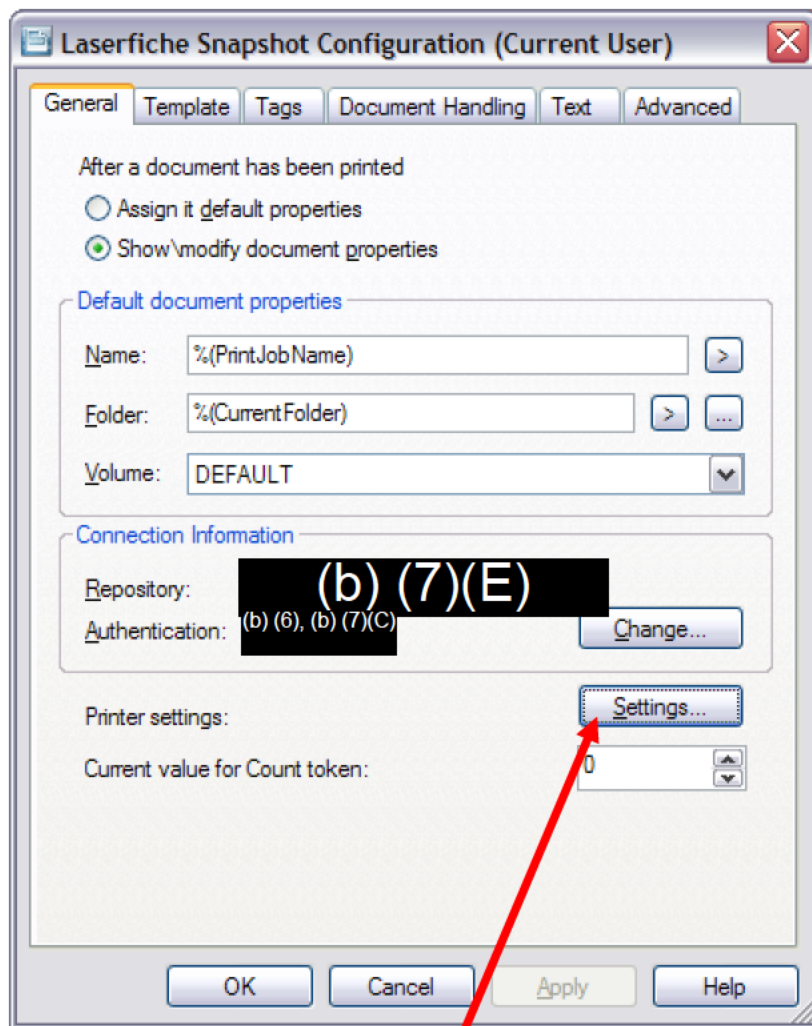
This next pop-up screen should be configured as shown above.



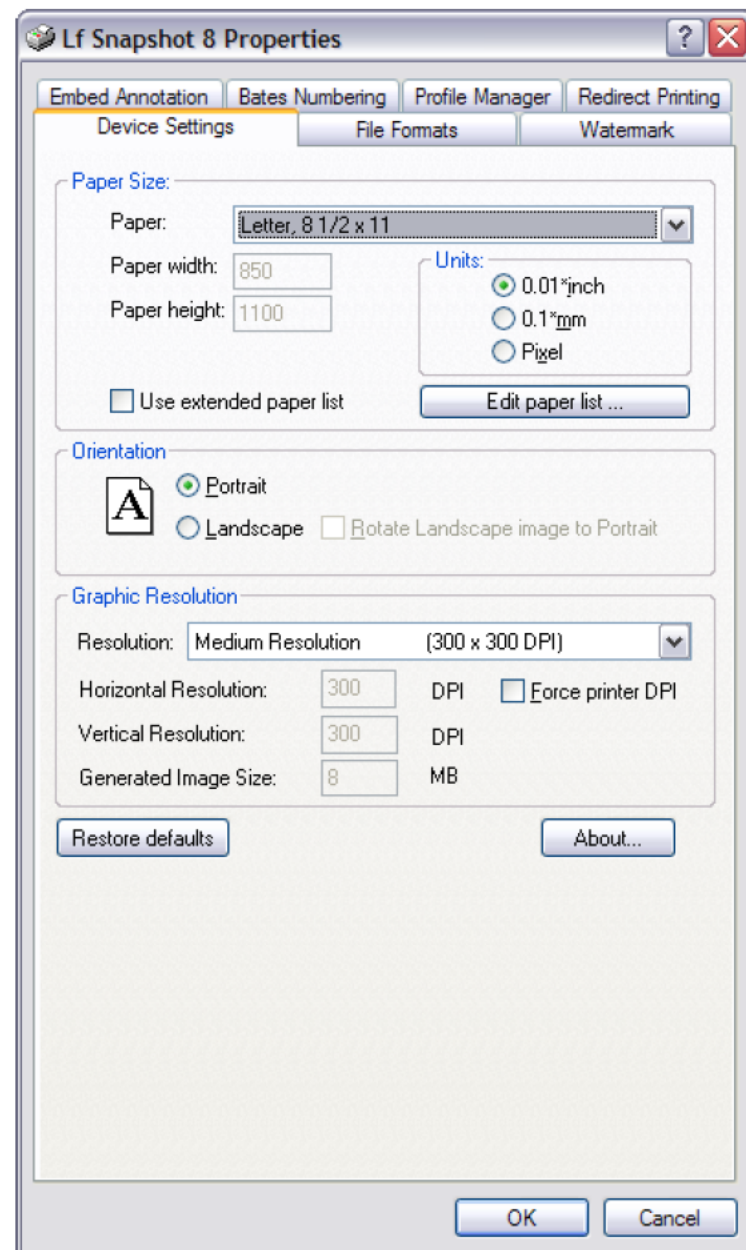
Under the General tab, please configure the Default document properties. On the folder line, you can indicate that you want your Snapshot documents to go to whichever folder you currently have open in Laserfiche by using the token as shown above. This token is found in the ">" button to the right of the line.

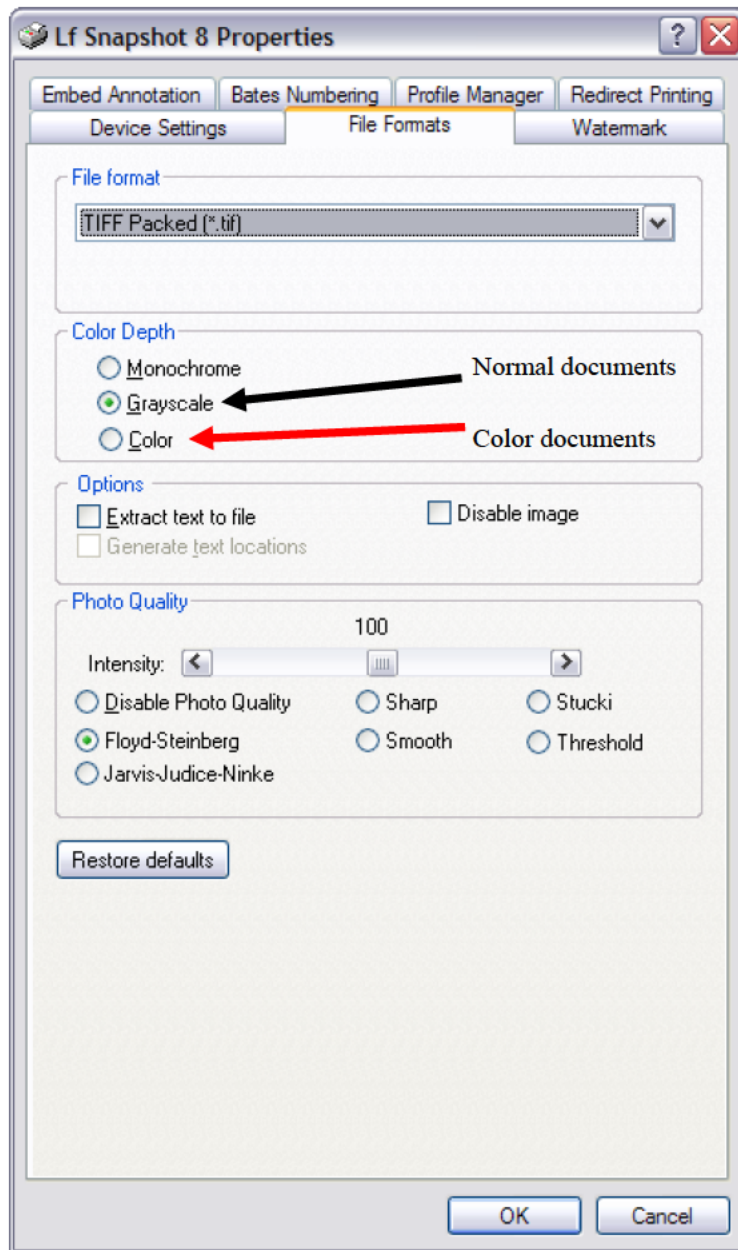


If you want to configure Snapshot to where it always puts documents into a specific folder, click on the ellipsis (button with three dots) to the right of the Folder line. This will give you a pop-up window which allows you to select the specific folder to set as your default destination.

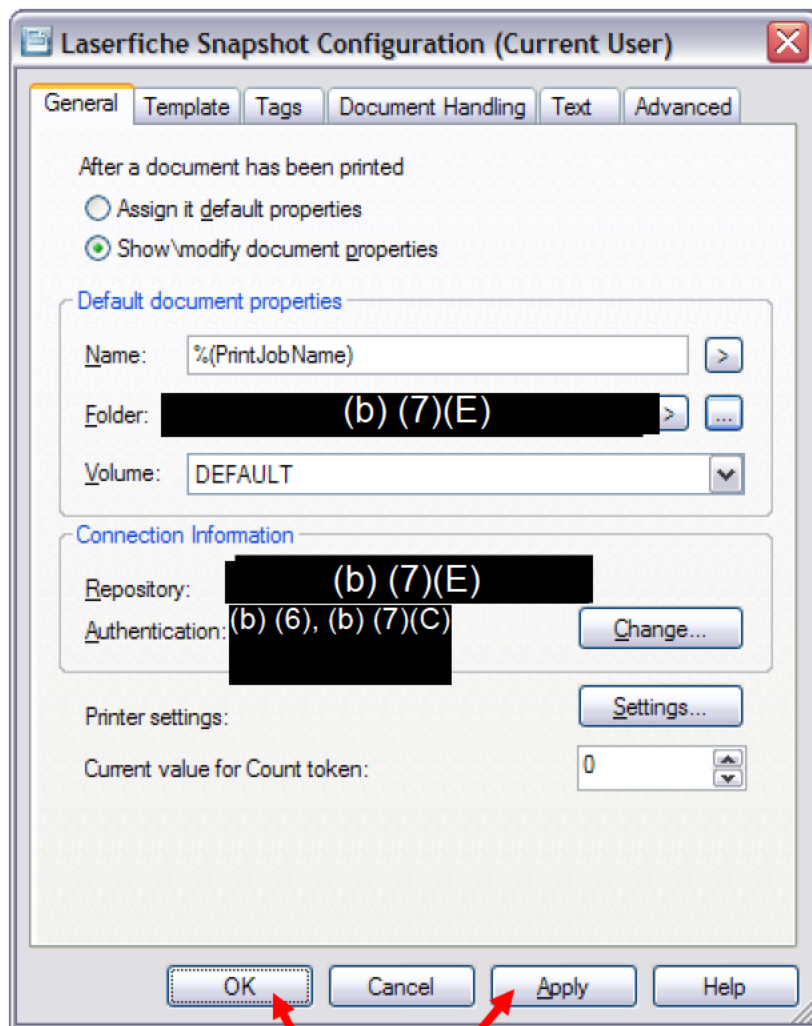


Click on the Settings button to configure the default Printer settings. On the Device Settings tab, the settings shown on the right should be set for most daily operations.

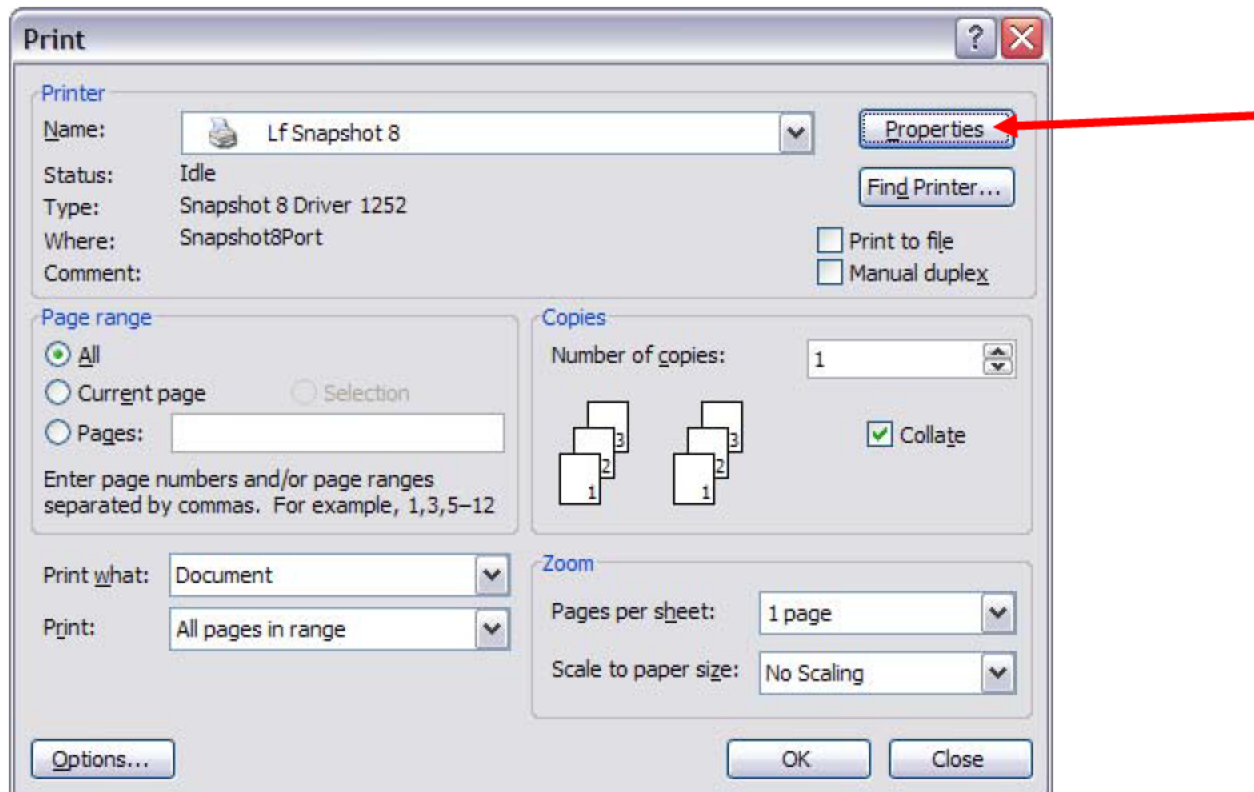




On the File Formats tab, the settings shown on the left should be set for most daily operations. The Color Depth option may be changed as necessary whenever color documents need to be stored in Laserfiche via Snapshot. The Photo Quality should always be set to Floyd-Steinberg. This prevents color images on documents from being displayed blacked-out or blurred.



To save your settings, click on the Apply button and then the OK button.



Adjusting Snapshot for color copies *on the fly*:

If you have configured Snapshot for Monochrome or Grayscale Color Depth for daily operations, you can adjust it to Snapshot in color for a specific document from the print pop-up screen shown above. Click on the Properties button, and it will give you the LF Snapshot 8 Properties pop-up screens as shown on the previous slides. Please keep in mind that any modifications made will only apply to the current Snapshot session.